

Monica Sipes, CFP[®], CIMA[®]

VICE PRESIDENT – WEALTH MANAGEMENT

📞 469-699-5277

✉ msipes@quadcapwm.com



Services

Investment Management

Tax Planning and Preparation

Employee Benefits

Estate Planning

Legacy Planning

Retirement Planning

Family Office

Credentials

Certified Financial Planner®

Certified Investment Management Analyst®

Education

Yale School of Management, Investment Management Theory and Practice

University of Texas at Dallas, BS-Business Administration and Finance

Overview

As Vice President of Wealth Management, Monica is a leader dedicated to guiding high-net-worth individuals and corporate executives toward financial success.

With over 16 years of experience, she brings deep expertise in comprehensive financial planning and investment management, holding both the **Certified Financial Planner (CFP)** and **Certified Investment Management Analyst (CIMA)** designations.

Monica is a recognized industry leader, earning prestigious accolades such as **FORBES Best-In-State Wealth Advisor**, **FORBES Top Women Wealth Advisor**, and **FORBES Top Next-Gen Wealth Advisor**. Her commitment to excellence and client-centric approach set her apart in the financial services industry.

For Monica, success means seeing her clients' goals and dreams become reality. She finds fulfillment in helping individuals and families achieve financial freedom while building legacies that endure for generations. She excels at navigating the complexities of wealth management, providing strategic insights that help families grow and preserve their wealth. Known for her integrity, diligence, and ability to simplify complex financial matters, Monica ensures her clients can focus on their priorities with confidence and peace of mind.

In her leadership role, Monica not only serves as a trusted advisor but also fosters a culture of innovation and excellence within her firm. She is committed to mentoring the next generation of financial professionals and shaping the future of QuadCap through her strategic vision and dedication to client success.

