

Tori Glass

LEAD PARAPLANNER

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Credentials

FINRA Series 66

FINRA Series 7

Education

University of North Texas,
BA-Integrative Studies,
2016

Overview

Tori is dedicated to supporting financial advisors by managing administrative tasks and fostering productive, trusted client relationships.

With more than seven years of experience in financial planning and client data analysis, she is passionate about helping clients achieve their long-term goals while building meaningful connections. Known for her attention to detail and precise analytical skills, she brings care and excellence to every aspect of her work.

In 2024, Tori joined QuadCap after a successful tenure at Spectrum Strategies LLC, where she honed her expertise in financial planning. During her seven years there, she supported six financial advisors, enabling them to successfully manage their businesses.