



INTEGRITY
IN ALL WE DO

KELLY PAN

Trader

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Kelly Pan is a Trader for Warren Averett Asset Management. Prior to joining the Firm, she worked in Corporate Marketing for a large bank headquartered in Birmingham, Alabama. Kelly's primary responsibility is to execute trades in client portfolios in a manner which maximizes tax and cost efficiencies. She also carries out manager and allocation changes as recommended by the Investment Committee. Kelly resides in Houston, Texas with her two rabbits.

Ask Me About

- Why learning about finance at a young age is important
- What it is like being a first generation Asian-American
- How to properly care for a pet rabbit
- My travels to 20 countries in three years and still counting
- How to find travel deals and plan trips abroad

Education

Bachelor of Science in Finance
University of Alabama at Birmingham
Birmingham, AL

Bachelor of Science in Management
University of Alabama at Birmingham
Birmingham, AL