



LISA ROCCAFORTE

CFP®

Senior Vice President | Financial Advisor

Lisa began her financial career in 1975 with Southern Bank. In 1986, she joined Dominion Bank, which became First Union National Bank in 1992. In 1999, Lisa moved to Essex Bank, where she started the investment arm of Essex Services. As vice president, she built a solid reputation for conscientious customer service and exemplary customer care.

Lisa earned her CERTIFIED FINANCIAL PLANNER™ (CFP®) certification in 2005. Her areas of focus include investments, 529 college plans and advisory services.

Lisa helps families develop their financial goals. She's passionate about helping her clients with any stage of their financial plan and loves seeing families take control of their money and find financial confidence.

Lisa was born in Trenton, New Jersey, but relocated to the warmer temperatures of Virginia in the late 1960s. She attended J. Sargeant Reynolds Community College, Virginia Commonwealth University and the University of Richmond.

Lisa and her husband Joe, enjoy spending time with their two sons and their active families. Away from the office, you'll find Lisa and Joe gardening, traveling, appreciating "lake time" and reading.

Lisa has been recognized as a Five Star Wealth Manager in 2017 & 2018.

To receive the 2nd Five Star Wealth Management award, researched and managed by Five Star Professional, a wealth manager must meet 10 objective eligibility and evaluation criteria associated with wealth managers who provide quality services to their clients. 939 wealth managers in the Richmond, VA area were considered for the award. 94 were named 2018 Five Star Wealth Managers which represents less than 7% of the total wealth managers in the area. Wealth managers do not pay a fee to be considered or placed on the final list of 2018 Five Star Wealth Managers. The Five Star Award is not indicative of the wealth manager's future performance.

 **Richmond Office**
4510 Cox Road, Suite 102
Glen Allen, VA 23060
Phone: 804.270.4470
Fax: 804.270.4490

 info@themainstreetgroup.com
 804.270.4470
 themainstreetgroup.com

 **Fairfax Office**
9697-A Main Street
Fairfax, VA 22031
Phone: 703.425.3688
Fax: 703.425.3698