

## Biography

### **Carol Lee Roberts**

IDFA General Manager

Carol Lee has over 30 years of experience in the financial services industry and holds the Certified Financial Planner and Certified Divorce Financial Analyst designations.

Carol Lee has an undergraduate degree from Augustana College and a Master's Degree in Financial Planning from DePaul University. As the Director of the Office of Professional and Continuing Education at DePaul University, her Financial Planning Education Center had the third largest Financial Planning Certificate program in the country and also offered classroom courses for the CDFA. Carol Lee also has experience in the field of certification having served as the Managing Director of Education and Examination at the CFP Board of Standards in Washington, D.C.

Carol Lee is a member of the Institute for Divorce Financial Analysts, the Financial Planning Association, and a former Board member of FPA-Illinois. She has participated in Financial Planning Days since the first event in Los Angeles in 2006. She has organized the event for the FPA Illinois chapter for the past three years and has participated in events in Miami, Florida; Columbia, Maryland; and Washington, D.C. She has also been a presenter in Miami, Florida; Columbia, Maryland; Washington, D.C.; and at the Chicago Financial Planning Days.