



#### SERVICES

Asset Management  
Goals-Based Planning  
Philanthropy & Gifting  
Risk Mitigation/Insurance  
Tax-Managed Strategies  
Wealth Transfer Strategies

#### EDUCATION

- Masters in Finance, IE Business School
- B.S., Southern Methodist University

## ALEXANDRA COQUOZ

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### PRIVATE WEALTH ANALYST

[acoquoz@orbawealthadvisors.com](mailto:acoquoz@orbawealthadvisors.com)

📞 312.670.7444

As a Private Wealth Analyst at ORBA Wealth Advisors, Alexandra is responsible for managing the group's relationships with all investors, as well as implementing strategic initiatives to ensure steady and continuous process improvement.

#### PROACTIVE

Alexandra brings experience in the areas of private wealth management, risk management and corporate cash management. She enjoys working directly with clients and advisors with operational requests and transactional support.

In addition to overseeing day-to-day business operations, she is the client coordinator who supports our valued client relationships. She strives to deliver memorable, personalized service to each client and is committed to exceeding client expectations.

#### OUTSIDE OF THE OFFICE

Alexandra is originally from Kansas City and has lived in Chicago for the past 6 years with her husband, two cats and a dog. Outside of the office, you can find her spending time with friends and family and walking her dog alongside the lake. She also enjoys traveling, golfing and taking advantage of Chicago's food scene.