

Lien Busby

1010 North San Jacinto, Suite 200, Houston, Texas 77002

Phone: 713-581-1994

lbusby@manskewealth.com

Lien helps lead a dedicated and well-credentialed team providing sophisticated wealth management solutions and individualized investment advice.

Her responsibilities include:

- Supervising completion of all of the firm's compliance deliverables and regulatory filing obligations
- Enforcing regulatory and company policies across a team of approximately ten people, to include week-by-week customer service standards during the first eight weeks after each new client signs on to work with the firm
- Executing quarterly fee collection flawlessly for hundreds of client accounts totaling approximately \$400 million
- Supervising accounting functions to include payment of all vendors and approval of certain expenses
- Researching and implementing all employee benefits to include medical/life insurance and retirement savings
- Providing direction on company insurance needs and employee certification requirements
- Creating training programs and helping to execute those programs so that, across the company, the various functions of a wealth management firm are done accurately and in concert
- Supervises and occasionally provides back office experience for financial advisors and their clients
- Led the Manske Internship for Professional Accomplishment and Leadership, an ivy-league professional development seminar that provides participants ten weeks of challenge and personal advancement

Her professional accomplishments include:

- Attained the Investment Adviser Certified Compliance Professional® (IACCP®) designation from National Regulatory Services in a single sitting for the test
- Successfully led a major company relocation from an office park in the Greenway Plaza to a boutique building in the Central Business District
- Improved the company's fee collection efforts and, in the process, created a Standard Operating Procedure that can be used to train others

The firm's accomplishments under her leadership include:

- Named "Best Places to Work" by Houstonia Magazine
- Named Five Star Wealth manager by Texas Monthly Magazine every year she's been in this role
- Named one of the top wealth management firms by the Houston Business Journal
- Named "Most Client Focused Wealth Manager – Texas" by Wealth & Finance International Magazine
- Featured in many publications such as The Wall Street Journal, U.S. News & World Report, and Reader's Digest
- Invited to speak at many organizations such as The University of Houston, Keller Williams, and Boeing

January 2013 – Present: Business Manager & Senior Client Associate, Manske Wealth Management

January 2012 – April 2013: Accounting Assistant, University of Houston Office of Scholarship and Financial Aid

Organizations

- One Time Visit Coordinator, Faithful Paws Pet Therapy
- Volunteer, Guide Dogs for the Blind Houston Puppy Raisers
- Mentor, Big Brothers Big Sisters of America

Personal & Odd Facts

- Raises honey bees in her backyard and often gives "honey in the comb" to others
- Volunteers with her therapy dog, Andale the yellow Labrador, at hospitals, nursing homes, and schools
- Helps socialize and teaches basic obedience to puppies in training with Guide Dogs for the Blind
- Is an avid lover of international cuisine, coffee, musicals, and traveling
- Taught English in Barranquilla, Colombia
- Traveled to Peru to conduct market research of solar powered lantern distribution

Education: University of Houston

B.B.A. Finance and Marketing, Magna Cum Laude

Favorite Quote

"The greatest leader is not necessarily the one who does the greatest things. He is the one that gets the people to do the greatest things." – Ronald Reagan