



*“Energy and persistence
conquer all things”
- Benjamin Franklin*

Mary Lee, Chief Operations Officer Lee Financial Partners, LLC

Mary Lee, Chief Operations Officer and pillar of Lee Financial Partners, LLC, is truly an individual. She approaches life with intensity and gains clarity and perspective from moments that others might pass over. She is clear in her convictions. “I’m a staunch supporter of anything that I firmly believe in—the Marine Corps, protecting our borders. I love my involvement in the Chamber [of Commerce].”

Mary joined Lee Financial Partners, LLC, in 2002. At the time, her husband, Marine Corps veteran and Lee Financial founder, James Lee, Jr., was buried beneath a stack of paperwork 8 feet high. What began as a relief effort became Mary’s mission, then her full-time job. She had started out juggling the administrative needs of the business and her nursing profession. But the business grew and, with it, the demands on Mary. She had to choose. “It was one of the biggest challenges I have ever faced,” she recalls. As a nurse, she had been a key contributor to some of the area’s largest hospitals. She had led a team, traveled the country, published and presented. Starting a new career meant working from the ground up. “It was a little bit of OJT,” (on-the-job-training) she laughs. “But I knew enough to know what I didn’t know. And I was determined that I wasn’t going to fall in the same place twice.” Mary went about creating systems and operations procedures to ensure that every financially regulated transaction was in good order, all the while learning everything about the business and the industry in which it operates. As it turned

out, Mary’s meticulous nature and staunch determination were as important to financial portfolios as they had been to surgical procedures.

Under Mary’s management, Lee Financial Partners, LLC, has been recognized year after year for flawless compliance reviews—every “t” crossed, every “i” dotted, every file in perfect order—no small feat considering the pace of growth that the firm has experienced! Mary was asked to speak on the company’s stellar compliance record at the 2010 Annual Conference for Financial and Investment Advisors. She hoped offices across the country might achieve the same level of precision achieved at Lee Financial Partners, LLC.

As the company has grown, so has the scope of Mary’s role. She is currently working on her Series 7 license and is looking forward to her next role as Lee Financial’s newest Financial Planner.

—Mindy Cordell



Lee financial Partners LLC is located at 2000 North Causeway Blvd. Suite E, Mandeville. 985-624-4860.