



Shayna B. Malcolm
Associate Advisor



Shayna serves as the Associate Wealth Manager and oversees Client & Office Management for Thompson Wealth Management (TWM). TWM was formed in 2005 offering a broad range of financial planning and investment management services to individuals, corporations, and organizations. TWM holds the following securities registrations: Series 6, 7, 63, 65 and 24 as well as Life/Health/Disability Insurance licenses. TWM also provides services in the area of budgeting, debt elimination, taxes, medicare, estate planning, and real estate.

Shayna is a licensed associate advisor monitoring each client portfolio, budget audits and management, client projects and services. She assists clients with launching their journey with the TWM Family and guides them every step of the way throughout the onboarding process. In addition to her main role, Shayna maintains and oversees office administration.

Shayna holds a Series 6 and Life/Health/Disability licenses. She is a certified Estate Planner and has extensive knowledge and expertise in a multitude of areas to include real estate, property management, and budgeting/finances. Shayna is a passionate and dedicated expert at providing positive motivation that drives people toward achieving their overarching goals by way of her extensive product knowledge, energetic personality, and team spirit.

Shayna possesses well over 10 years' experience in the finance industry. She is dedicated to helping individuals reach their financial goals through each level of their journey from basic budgeting to comprehensive financial planning.

A graduate of Pennsylvania State University, Shayna holds a B.A. in Business Management and Finance. She was the cheerleading captain for Penn State from 2012-2014 and is currently the head cheerleading coach at Envy Athletics. She currently resides in La Verne, CA with her two daughters and husband O'Neil.

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