



Tracy Hagberg
Chief Compliance Officer

Tracy has been a valuable asset of Access Wealth Planning for its entire 30-year history. Today, Tracy's responsibilities are diverse and critical to the firm's operations. She fulfills four main roles: Chief Compliance Officer, Director of Human Resources, Office Manager, and Bookkeeper. Perhaps the title that best sums up her role at Access Wealth Planning is "Chief Problem Solver."

Tracy is in the process of obtaining her IACCP (Investment Adviser Certified Compliance Professional) designation. The program was developed by NRS and is co-sponsored by the Investment Adviser Association (IAA).

Personally, Tracy is incredibly active in her church and community. At the United Reformed Church in Clifton, she sits on the Board as Vice President as well as sitting on the Finance Committee. She is also a Board Member and Secretary of the Christian Counseling Center in Clifton.

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