



Valerie Tanner

Client Service Senior Associate

Valerie Tanner is a Client Service Senior Associate at Olympus Wealth Management. Her focus is to develop strong client relationships while delivering an exceptional client experience. She commits herself to ensure all service requests are met in a diligent manner for each client and member of the team. Valerie's job encompasses many responsibilities, including project manager, trainer and ensuring that team members have the tools they need to do their job effectively. She prides herself on first-class excellence and providing white-glove service.

Valerie brings a strong background in customer service and operational support, with over 14 years in the financial industry. Prior to joining Olympus Wealth Management, she began her career in 2005 at Morgan Stanley servicing high-net-worth and ultra-high-net-worth clients as well as the President's and Chairman's Club advisors and their teams. She later transitioned into a management role at the firm and spent 4 years overseeing back end operations and client services. She also served as a Relationship Manager at Addepar, helping RIA firms transition their clients onto the Addepar platform.

Valerie earned her Associates Degree from the University of Phoenix. Outside of work, Valerie enjoys family, friends, live music, church and anything outdoors. She currently lives in South Jordan, Utah with her children and pets.

Education & Registrations

Associates of Arts/Business, University of Phoenix | FINRA Series 66 Registration | FINRA Series 7, 9 Registration (Inactive)