# SOPHIE SCHROYER

*Financial Services Executive*

## ABOUT SOPHIE

Sophie is originally from London, England. In 1995, she completed her studies in Business Estate Management at The Royal Agricultural University, Cirencester. Upon graduation, she had a successful career working in the City of London where she was then asked to develop and build a construction recruitment company, which is now one of the leading recruitment companies in the United Kingdom.

After leaving England, she worked and lived briefly in various states including South Dakota, and the Carolinas. She now calls Delaware home and spends her time working between MMGP's Bala Cynwyd, PA office & New Castle, DE office.

Sophie, who is a special needs parent, is passionate about helping the special needs community and spends her free time volunteering at local community events, organizations and schools.

She prides herself in getting to know each client so that she can understand their individual needs and what matters most to them. This helps her recommend products and strategies designed to meet their current, and more importantly, future needs.

When she is not poolside watching her youngest son swim, you can find her with a good book, enjoying the arts & music. Sophie currently resides in Wilmington, Delaware with her two sons Ethan and Joel.

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## ABOUT MASSMUTUAL GREATER PHILADELPHIA

Pivotal life events often occur without warning. At MassMutual Greater Philadelphia, we take great pride in knowing that we have helped our neighbors, friends, families and business owners make good decisions when it comes to being financially prepared for the unexpected. We put the needs of our clients first and hold the strong belief that doing business the right way leads to long-lasting relationships with the communities we serve.

## PERSONAL SOLUTIONS

Wealth management and protection services

- Financial guidance
- Life and disability income insurance needs
- Review of savings and investments
- Long-term care needs assessment
- Budgeting and cash flow study

Retirement products and services

- Fixed and variable annuities
- Retirement income needs review

Tuition funding programs

- College costs analysis
- Insurance and investments

Investment products

- Mutual funds
- Unit investment trusts
- Variable annuities

Estate planning

- Tax efficiency strategies
- Charitable giving

## BUSINESS SOLUTIONS

Business continuation planning

- Business continuation planning
- Funding option analysis
- Buy – sell strategies
- Family business succession planning
- Key person insurance

Executive fringe benefits

- Executive bonus plans
- Split dollar insurance
- Deferred compensation funding
- Salary continuation plans
- Non-qualified executive fringe benefits

Employee benefit program

- Pension, profit sharing and 401(k) plans
- Payroll deduction plans