



Ms. Lee founded Candy J. Lee Financial Planning & Money Management in 1992. Two years later she co-founded Financial Services Int'l Corp. "fsic", member FINRA/SIPC, a full service broker-dealer, investment advisory and risk management firm. fsic was named one of the top securities firms in the Puget Sound as featured by the Puget Sound Business Journal 2001 through 2011.



With financial experience spanning three decades, Candy's expertise also includes management of a mortgage brokerage, commercial loan development, management of the Northwest's largest securities trading floor, and a tax advantaged investment department for a large regional bank.

Candy is experienced in personal and business financial consulting, risk management, institutional sales and trading, underwriting, syndications, residential real estate investing, comprehensive financial planning, and money management. She is a Certified Financial Planner, a Chartered Life Underwriter, has Life and Disability Insurance licenses, and holds General Securities and Municipal registrations (Series 7, 63, 65, 24 and 53). She is a three-time recipient of the Five Star Wealth Manager Award, the most widely published wealth manager award program in North America.

Besides being an active Seattle 4 Rotarian, Candy was the charter President of the Rush Hour Rotary Club in 2000 and served as Assistant Governor for Rotary District 5030 2001-02. She is a member of the Columbia Tower Club where she has served on the Board of Governors and founded the CEOtoCEO Breakfast Series. Candy is a member of the Puget Sound Chapter of the Financial Planning Association, the Estate Planning Council of Seattle, Seattle Philanthropic Advisors Network, The Executive Network of Seattle (TENS), Pacific Northwest Ballet Advisory Board Trustee and serves on the Development Committee and Leadership Council for the "Building the Future" capital campaign for Seattle Goodwill.

Candy is married to Rocke Koreis, a Project Integration Manager in 767 Engineering Integration at Boeing Commercial Airplanes. Candy spends her leisure time with her husband crafting new recipes, gardening, woodworking and doing home improvement projects. She is also learning to play golf and create stained glass artwork.