

Christine Sun

CLIENT SERVICES MANAGER, INSPIRED FINANCIAL

"I think there's nothing more amazing than helping others every day. One kind word can change someone's entire day."



Christine Sun is our newest Client Services Manager and is a returning resident to Southern California. As a Client Services Manager on our team, she is a co-operational lead with our custodian, back office services provider, and other systems that support our work with our clients. She is also responsible for new account establishment, account transfer and rollover processing. Christine loves building relationships with clients and colleagues, but her secret super-power is expert troubleshooting for client concerns.

Christine brings over 14 years of Client Services and operational experience to the role from prior work as Client Associate at UBS Financial in Dallas, TX and New Business Manager at Armstrong Advisory Group in Needham, MA, before transitioning to our firm. She is originally from Dedham, MA, but has lived in Plano, TX and just spent the last few years back east living near family. Christine attended The University of Massachusetts at Boston majoring in Liberal Arts. She In her spare time, Christine spends time with her husband Alan and enjoys jogging, yoga, tennis and any day at the beach.

Fun Facts:

- If I was not a financial client service professional, my dream job would be becoming a personal private chef.
- While living in Texas I spent three plus years taking weekly tennis lessons to be able to play alongside of my husband. My goal was to win...
- Yoga enthusiast and currently learning the power of meditation.
- I always want to know your favorite book, and why!