



Deana DeLuca – Financial Advisor and NSWIB All-Star

Deana DeLuca describes herself as a “two-fold financial advisor.” She says that she is “in the business of giving advice,” her primary focus being estate and tax planning, budgeting, and goal-based planning. In other words, helping clients to create a wealth management picture. Deana is also a Certified Divorce Financial Analyst. She describes this work as a legal process where she can educate, hand-hold, and steer her clients toward financial independence on their new financial path. While Deana works under the umbrella of financial giant Morgan Stanley, she is actually an independent contractor.

Deana’s first taste of the financial industry came in college. She wanted to help her parents run their real estate appraisal business, and wasn’t sure how to best contribute. She did a self-assessment, and realized that she needed to better understand finance and accounting, so she shifted her focus there. It was a good move, Deana found that she had an affinity for finance, and there was much real-world learning to be had in business school in 2008, smack in the middle of country’s financial crisis. Deana says, “I wanted to make sure that my parents business would never be affected if I ran it.” At the time, her plan was to someday take over the business. She dug in. After college, she interned at Morgan Stanley, and found a home. She says, “My other financial services internships before that scared me. They were all product-based. Morgan Stanley allows me to offer a breadth of options to clients.”

When asked advice for when to wade into financial advising, she recommends that people start immediately, once they start working, especially entrepreneurs. Otherwise, any life transition – marriage, children, death in the family, divorce - is a great place to pull a financial advisor on board. Then, meet at least four times per year. She says, “It helps to have a plan that is fluid and flexible and changes as your life changes.”

Deana says her greatest challenge is being a woman in a male-dominated industry. However, she also views it as a huge opportunity. She says, “Plenty of women need a non- salesy financial advisor. Somebody who is patient and empathetic.” At the end of the day, Deana finds fulfillment in working with clients, reassuring them, and providing financial independence.

This year marks Deana’s fifth year with North Shore Women in Business. She originally found the group after college when she needed a network of business professionals. She says, “I wanted to surround myself with women who could help and are like-minded.” Deana is currently secretary for NSWIB, and says, “I like working on the board. We give back a lot. We have this very close relationship.”

She would like to see NSWIB continue to support women in business through networking, social events, and community involvement. To new or potential members, Deana says, “You’ll never know until you try. Come in wanting to make connections, and your experience will be successful.”

Find Deana at [The Parquette Wealth Management Group at Morgan Stanley](#).