



Wealth
Management



Laurie Haelen, AIF®
Senior Vice President
Director of Wealth Solutions

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Your Financial Professional

Laurie Haelen is a Senior Vice President, Director of Wealth Solutions with CNB Wealth Management. Leveraging over 25 years of experience in the Wealth Management industry, Laurie oversees the CNB Wealth Solutions team. She is responsible for the creation and implementation of the solutions within the team and ensuring the delivery of the highest quality of service for our clients.

Prior to joining CNB, Laurie spent the last decade at Tompkins Financial Advisors in Pittsford, NY, where she most recently was Managing Director of WNY, overseeing a team of Wealth Advisors, Financial Planners and Tax Professionals and ensuring the highest level of service for clients. Prior to that, she served in a variety of investment roles, including Director of Investments for Tompkins Financial Advisors, Sr. Portfolio Manager at JP Morgan Chase and Portfolio Manager for HSBC Bank locally.

Laurie resides with her family in Rochester, NY.

Education & Designations

SUNY at Geneseo, B.A.
Accredited Investment Fiduciary (AIF®)
Canon Trust Investments and the American Institute of Banking
New York Institute of Finance

Professional & Civic Affiliations

2012 Athena Award Finalist
Board Member, Rochester Philharmonic Orchestra
Board Member, Monroe Community Hospital Foundation
Former United Way Community Investment Cabinet
Former Board Member, Rochester Education Foundation
Former Member, University of Rochester Planned Giving Council
Former Board Member, Women's Foundation of Genesee Valley
Former Board Member, YWCA of Rochester & Monroe County
Former Board Member, Consumer Credit Counseling Service of Rochester