

Biography

The White Oak Group

Mitzi H. Maxey

Private Wealth Financial Advisor, Senior Vice President - Investment Officer



Mitzi Maxey has over 30 years of experience in the finance industry providing investment strategies to her clients by understanding their goals and needs and following a disciplined approach.

Mitzi provides comprehensive investment and wealth management advice and strategies to help a select group of clients build, manage, and preserve their wealth. Her process centers on listening to people and understanding their current situation, past financial experiences and their goals and objectives for the future. She knows that investment decision-making is a product of reason and emotion. Exercising patience, compassion and skill enables Mitzi to help her clients balance both. Mitzi has been a financial advisor since 1998.

A graduate of Averett University and a student of her craft, Mitzi is committed to on-going professional development in the areas of planning, investment allocation, liability management, non-portfolio risk management and estate planning strategies.

She understands what it means to have a career, start and raise a family, balance work and home, celebrate with loved ones, care and comfort them, and grieve their loss. Her life experiences have helped her foster relationships with clients who feel safe and uninhibited even when discussing delicate matters relating to money between spouses, parents and their children, and adult children and their aging parents.

Mitzi is optimistic about the future maintaining a strategic mind-set, yet unafraid to rethink and explore better ways to serve her clients as evidenced by the formation of The White Oak Group of Wells Fargo Advisors. Along with Bill Hardin, Senior Private Wealth Financial Advisor, together they are committed to helping their clients find joy, contentment, and purpose in their lives.

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