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MEMBER PROFILE - JULY 2003

Taren D. Coleman

Taren Coleman likes to crunch numbers, so she was an accounting major in college. After she graduated, however, she wanted “more insights into the world outside accounting,” so she selected subsequent job situations to help her gain more experience in related areas. Working for IBM initially, she then spent six years with the NASDAQ Stock Market. “Being in that environment created an interest in the securities market,” says Taren, who discovered during those years that she enjoyed working directly with people. She then spent a year working with an Internet startup company, FinanceU.com, which did on-line retirement plans.

All of this background prepared Taren for her current work as a financial consultant with AXA Advisors, a family of financial services companies. AXA is an old European company whose American counterpart is Equitable Life. Some years ago, AXA branched out into the entire world of finances and acquired companies like Equitable Life, Alliance Capital Management, and the Sanford Bernstein group of companies. These are all well respected, large companies which offer insurance, investment and other financial services. Taren is self-employed, working through these companies, and using the specific products and services that she chooses to use for her clients. She chooses carefully among mutual fund families, insurance companies that have reciprocal agreements with Equitable, and other insurance companies outside Equitable. Taren is licensed for insurances, investment advice and securities, based on the requirements of these states in which she performs financial services.

Working with her own clients now for the past two years, Taren, who still enjoys crunching numbers, likes her work “because it’s so personal.” She enjoys becoming involved in her clients’ business and financial lives. Her clients are all people whom she knows or has met, or who come through referrals.

A WBO member for approximately two years, Taren likes networking and trying to understand how WBO’s women grow successfully in their different areas. She also likes being able to be a resource for her clients and finds that WBO’s accountants, attorneys, and bankers enable Taren to augment her core services to her clients.

What does Taren do when she’s not working? By her own admission, she is “a tennis junkie,” who enjoys both playing and watching. She belongs to two tennis leagues during the summer months, so she gets plenty of exercise. She also enjoys “shopping for shoes and handbags.” Taren grew up in Takoma Park and has been a Marylander all of her life, except for her college years.