

Lori Moncrieffe, MSc, CAMS

FOUNDER AND CONSULTANT, LEGACY SOLUTIONS

VICE PRESIDENT, CORPORATE FINANCE

Lori is a Caymanian finance professional with more than 15 years in banking, credit and corporate finance with two of the largest banks in the Caribbean. She is a Vice President, Corporate Finance in banking, and founded Legacy Solutions in 2018 to bring the same lender-grade discipline to individuals, families and business owners.

Since 2011 she has structured at least US$20 million in credit facilities every year in her banking roles, and since 2018 she has secured more than US$157 million in commercial and personal financing for Legacy Solutions clients: US$450M+ in commercial and real estate financing across her career. Her rare blend of individual, cross-border and corporate expertise lets her see a deal the way a lender does and give clients strategic insight few professionals can match.

She has managed commercial loan portfolios of US$150 million to US$200 million and deposit portfolios of US$75 million to US$100 million, and has structured and assessed transactions from US$1 million to US$50 million.

US$450M+	US$157M+	US$20M+	15+ years
commercial and real estate financing structured across her career	secured for Legacy Solutions clients since 2018	in credit structured every year in her banking roles since 2011	in banking, credit and corporate finance

CAREER

Jul 2026 to present	**Vice President, Corporate Finance**	Caribbean banking
2018 to present	**Founder and Consultant**	Legacy Solutions
2023 to 2026	**Senior Relationship Manager, Business Banking**	Caribbean banking
2018 to 2023	**Relationship Manager**	Caribbean banking
2017 to 2018	**Corporate Manager**	Caribbean banking
2011 to 2017	**Credit Manager**	Caribbean banking
2010 to 2011	**International Banking Associate**	Caribbean banking

Community. Board Member, Cayman Islands Little League Association, since 2015, and a player, coach and umpire with the league for over 25 years.

EDUCATION

- Master of Science in Finance and Accounting, University of Wales (2015), Cayman Islands Department of Tourism scholarship
- Bachelor of Science in Finance, University of Tampa (2009), inaugural recipient of a Caribbean bank scholarship
- Associate of Arts in Accounting, University College of the Cayman Islands
- Beta Gamma Sigma, the international honour society for business

PROFESSIONAL CERTIFICATIONS

- **Certified Anti-Money Laundering Specialist (CAMS)**
  ACAMS, 2021
- **Real Estate Investing and Analysis Certificate**
  Wharton Online and Wall Street Prep, 2024
- **John Maxwell Certified Coach, Speaker and Trainer**
  John Maxwell Team, 2023
- **DISC Behavior Consultant**
  John Maxwell Team, 2025

LEGACY SOLUTIONS

Every legacy starts with a plan.

Legacy Solutions was founded in 2018 to be a true partner in our clients' financial journey: helping them sharpen and clarify their goals, then guiding them strategically into the right financing and investment opportunities, so ambitions become measurable, lasting results and long-term financial confidence. Since its launch, the firm has secured more than US$157 million in commercial and personal financing for its clients.

We are issuer-neutral: we are paid by our clients, never by a bank, developer or broker, so every recommendation is made in the client's best interest.

AREAS OF CONSULTING

FOUNDATION

Financial Coaching

Helping clients identify, define and create their financial goals, with a written plan and 1, 3 and 5-year milestones.

GROWTH

Financing Consulting

Structuring and securing financing for property purchases, refinancing, projects and real estate development.

GROWTH

Financial Modelling and Assessment

Lender-grade Investment Summaries, risk assessment, profitability analysis and cash-flow projections.

WEALTH

CFO Advisory

Clear financial insight, disciplined cash management and data-driven decisions that protect profitability and build long-term value.

CONTACT

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Book a consultation

45 minutes · no cost · no obligation