



Contact Information

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Professional Services	Financial counselor Financial planner Life coach Financial coach
Practice Approach	Cognitive behavioral NLP focus Financial Life Planning
Client Focus	Individuals, couples, families
Typical Client Profile	Age: 30-60 Gender: Female Income: N/A Net Worth: N/A
Licenses/Certifications/Designations	CFP FMA CIM FCSI CWSP FDS CSA MNLP MTLT
Education	College
Fee Structure	Fee For Service
years in Practice	17
Professional Association Affiliations	Financial Planners Standards Council Financial Therapy Association ICF, ABNLP, ABH
Research Interests	Yes - behavioural

Personal Statement

Ascot Wealth Advisory is a non-traditional wealth advisory providing comprehensive services to achieve and maintain "True Wealth." After noticing how the financial services industry had become so product and commission driven; and when economic turmoil hovered over people carrying high credit loads; I questioned 'what was missing' . The Ascot business model was conceived to fulfill the "missing link". **Counseling** – to bring awareness to personal relationships with money, discovery of obstructive behaviors, Recognition of patterns and habits which have sabotaged previous effort. **Coaching** - Align deepest values with financial goals; replace negative behaviors with more effective action strategies to achieve full potential. **Planning** - Set realistic and achievable goals, to achieve consistent success and balance in life. **The result** - a realistic plan with the mindset to achieve, and maintain! **Clients** - recognize our value from knowing they have a true advocate for their personal and financial wellbeing by their side.