



Contact Information

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Personal Statement

I have been fascinated by personal growth and development as well as psychological and systems issues since I wrote my first paper on the subject in high school. I use the financial planning process to facilitate financial success, financial health, while allowing spiritual and personal growth. In the last couple of years I have received more than 170 hours of training in conflict resolution to become more skilled in holding conversations to facilitate family system break-throughs.

My experience with clients has shown me that by listening and helping to create an environment for change, amazing things happen.

Professional Services	Integrated Financial Planning Financial Facilitation Investment Management Multigenerational Conversations Conflict Resolution
Practice Approach	Listening, Facilitation and Process Orientation
Client Focus	Individuals, Couples, Families
Typical Client Profile	Age: 50+ Gender: N/A Income: N/A Net Worth: At least seven figures
Licenses/Certifications/Designations	CFP® CFM AIMC Registered Investment Advisor
Education	College for Financial Planning
Fee Structure	Fee Only – Retainer
Years in Practice	33 years
Professional Association Affiliations	Financial Planning Association NAPFA Financial Therapy Association UC Davis
Research Interests	Financial Behavior