Financial Therapist Network Listing

Professional Services	Financial planning
Practice Approach	Fee based, fiduciary centered
Client Focus	Individual, family, and small business
Typical Client Profile	Age: 21+ Gender: All Income: Varies Net Worth: Varies
Licenses/Certifications/ Designations	Series 66 Uniform Combined State Law license, Series 7 General Securities license, Texas Department of Insurance license, Accredited Asset Management Specialist, Accredited Investment Fiduciary,
Education	MPH Economics, BS Finance
Fee Structure	Hourly and fee based on portfolio size
Years in Practice	14
Professional Association Affiliations	Financial Therapy Association, College for Financial Planning, fi360
Do you work *at a distance* such as with Skype?	Yes. Licensed in Texas and North Carolina
Research Interests	Gerontology, retirement planning

Contact Information

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Personal Statement

Wealth management is more than investment solutions. I approach each situation with a holistic view of the landscape you live and work in. When I work with you, I evaluate the situation closely and develop options for us to consider before moving forward.

By combining my coaching, counseling, and consulting skills, I help individuals, couples, and small business owners live in clarity and good health in the realm of their finances.

My advice is based on a deep understanding of your entire financial picture as I act to bring together all aspects of your personal finances and develop your comprehensive plan. I see myself as part of your team in the management of your assets and can collaborate with your attorney, CPA, and others to ensure seamless management of your affairs.