Financial Therapist Network Listing

Professional Services	Certified Financial Planner, Investment Advice, Tax Preparation, Financial Coaching including basic Financial Therapy.
Practice Approach	Life planning from 20 year olds setting up financial skills and habits to post retirement life transitions and generational wealth transfer.
Client Focus	Both those who are starting adult life and those who are in later adult life transitions; multi-generational families
Typical Client Profile	20-35 year olds and 70 - 95 year olds, anywhere from in debt to $10+ million of assets invested
Licenses/Certifications/ Designations	BS, MBA, CFP, RTRP, CTEC reg, RIA/IAR, CFT-I
Education	BS in Computer Science, Purdue University; MBA, Pepperdine University, CFP, College of Financial Planning. Financial Therapy: FTA
Fee Structure	Flat fee based on level of service from $125/month to $1,250/month
Years in Practice	25+ years
Professional Association Affiliations	Financial Therapy Association (FTA); XY Planning Network (XYPN); National Assoc of Personal Financial Advisors (NAPFA)
Do you work *at a distance* such as with Skype?	Yes, video meetings and phone
Research Interests	Couples, young couples with unequal debt burdens

Contact Information

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Personal Statement

I started South Bay Financial Partners after first exploring financial planning as a child growing up with a mom who became a financial planner in the 1970s, before the career even existed. I knew I would end up helping people who dread facing, or worse who are stressed and worried, about financial decisions.

I've been working in financial planning, investment advice, and tax preparation for about 25 years. I specialize in multigenerational financial planning which includes financial coaching for younger generations, raising a family, having a successful retirement, later life transitions, and generational wealth transfer. I also specialize in financial planning for charities and charitable giving including bookkeeping and tax preparation for Pooled Income Funds. I started my career in software programming and systems design. After ten years in the computer business, I decided to raise a family and join my family's financial planning firm, Albanese, Hemsley & Tussing, Ltd. until my mom retired after 40+ years of helping people with their financial planning.