

Live a great financial life.



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I offer a range of financial strategies to help you set financial goals or achieve financial goals you may already have. I work with small businesses, people of all ages, situations, lifestyle, and income brackets. My philosophy is to protect everything you earn, implement a plan that works in any situation, and make sure you always have uninterrupted cash flow.

I worked for thirteen years for nonprofit and government agencies in public health, senior health, food access, food retail business consulting, and nutrition education in low-income communities. In 2018, I was a guest speaker at the National Association of Convenience Stores where I discussed healthy food marketing. In 2019, I was a panelist at the U.S. Capitol Food Tank Summit to talk about food as medicine, food insecurity, and social disparities.

My passion has always been helping people improve their health and living circumstances. Having worked with low income populations my whole life, I've seen the struggles that people go through and a lack of financial guidance was a major factor. I made the decision to switch from helping people change health behaviors to changing financial behaviors and teaching financial fluency.

Areas of Focus:

- ***Estate Planning***
- ***Retirement Strategies***
- ***Wealth Building & Management***
- ***Debt Elimination***
- ***Small Business Risk & Tax Mitigation***
- ***Property & Casualty Insurance***
- ***Small Business Exit & Succession Planning***
- ***Long Term Care Planning***



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