



# BREE EDGERLY, FPQP<sup>®</sup>

BUSINESS DEVELOPMENT MANAGER



Pablo Picasso once eloquently stated, “The meaning of life is to find your gift. The purpose of life is to give it away.” I’ve always been passionate in my pursuit of living a meaningful life; discovering my career and motherhood within the same year have packed the last half decade of my life with purpose.

Prior to starting at SecondHalf Coach Wealth Management as Director of Client Experience in the summer of 2017, I would best summarize my first 27 years as exploratory and carefree. I grew up the second of four daughters in a loving and supportive family with all the opportunities of Greater Latrobe School District at my disposal. A diligent student, passionate about theater, music, and literature – I was a textbook portrait of a choir nerd. I found and embraced two of my life gifts during this early school age: performance and writing. My performance experiences fostered a confidence that has aided me through the years in my inclination toward leadership. I also discovered my passion for writing through my venture as editor in chief of the high school magazine and decided to pursue a bachelor’s degree in English Literature and Secondary Education at St. Vincent College.

In a surprising turn of heart in my final semester of student teaching, I ultimately decided that the classroom was not for me despite my love of learning. In the immediate years that followed my college graduation, I took on several job positions in event planning. Managing and planning public events for both local businesses and non-profit organizations afforded me exposure to a large network of professionals and harnessed within me an interest in the pursuit of drawing purposeful connections across the community.

All of these experiences pointed me to my position at SecondHalf Coach Wealth Management where I have proven crucial to a team committed to ensuring exceptional client experiences over the last four years, building lasting relationships and leading initiatives to enhance workflow efficiencies and produce new marketing materials. My prior job experiences armed me with a diverse set of skills in the areas of event planning, relationship development, strategic planning, and operational management, all of which I utilize to strive for the highest quality of service for our client family. Shortly after starting with our firm, I earned my Financial Paraplanner Qualified Professional (FPQP)<sup>®</sup> designation which equipped me with essential industry knowledge for my responsibilities in onboarding new clients, assisting existing clients with service needs, managing communications, and curating relevant educational content for our website and client events. I have honed in on another of my gifts – a genuine compassionate desire to help people -- upon which I hope to build the future of my career helping the clients our firm serves to achieve their goals and also live purposefully.

Additionally, being a part of the Go2Goal team has enabled me to carry out both my passion for writing through my position as editor/writer for GOAL Magazine and my conviction to build up our community through the work our non-profit undertakes each year to create opportunities for community collaboration and philanthropy.

Through this entire journey of personal discovery over the last decade, my husband and very best friend has been at my side packing our life together full of exploration, art, good conversation and all things DIY. Within the same year that I started on my financial planning career path at SecondHalf Coach, Michael and I embarked on the most rewarding (and challenging) adventure of parenthood. We welcomed our first son Miles in the spring of 2018, and just a short 18 months later introduced him to his little brother Lewin. Having grown up a lover of the outdoors and reckless creativity, I have fallen quite naturally into my role as a boy mom and embrace all of the dirt and laughter filled moments of our current toddler life at home in Ligonier. I feel so much gratitude to have found so many of my gifts by early adulthood and to have the outlets between my family, career, and community to spend my life sharing those gifts.



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