



## **POSITIONS**

- Owner, AJW Financial Inc./Amy Jensen Wolff, CFP<sup>®</sup> (2002 to present)
- Owner, The Colab Suites (January 2025 to present), dba Collaborative Alliance, Inc. (Jan. 1, 2006, to July, 2024)
- Co-Owner, xBrezza, LLC (July 2023 to present)
- Senior Financial Planning Associate, Chase Financial Consultants, Inc. (1998-2002)
- Financial Advisor, R. Chase Financial, (1993-1998)

## **PROFESSIONAL EXPERIENCE**

- Preparation of customized financial plans, including cash flow, tax projections, estate planning, retirement estimates, and education funding.
- Development of customized asset allocation strategies.
- Integration of life, disability, medical, and long-term care insurance into client's risk management program.
- Collaboration with client's attorneys, accountants, mental health professionals, realtors, and mortgage brokers.
- Coaching clients in their goal setting and life-planning decisions.
- Guidance for married couples towards compromise in financial decisions.
- Education of clients in all aspects of their finances to promote informed decisions.
- Research of securities and advanced financial planning topics.
- Compliance manager for Minneapolis branch office of Cetera Advisor Networks LLC (OSJ)
- Financial projections and forecasts to illustrate divorce settlement proposals.
- Analysis of tax and cash flow scenarios due to effects of income, spousal maintenance, and child support.
- Neutral guidance for married couples working through collaborative divorce and mediation.
- Non-neutral guidance for individuals going through divorce.

## **EDUCATION**

- Bachelor of Science—Business, University of MN, Carlson School of Management, 1992
- Student Exchange Program, University of Puerto Rico- Rio Piedras, 1989-1990
- Certified Financial Planners Program, College of Financial Planning, 1995
- Certified Divorce Financial Analyst Program, The Institute for Divorce Financial Analysts, 2002

## **PROFESSIONAL CREDENTIALS AND MEMBERSHIPS**

- CERTIFIED FINANCIAL PLANNER<sup>™</sup> professional, 1995
- Certified Divorce Financial Analyst<sup>®</sup>, 2002
- MN Insurance License # IN-20001775, 1994
- Series 7, General Securities Representative, 1993
- Series 63, Uniform Securities Agent State Law Registration, 1993
- Series 24, General Securities Principal, 1999
- Hall of Fame Member, Cetera Advisor Networks, 2025\*\*
- Board Member, Daisy Camp, 2011-present
- Board Member, MN's Collaborative Law Institute, 2005-2007, 2009-2011
- Co-President, MN's Collaborative Law Institute, 2007
- Board Member, International Association of Collaborative Professionals (IACP), 2007-2009
- Board Member, Financial Planners Association of MN, 2004-2005
- Member, The Institute for Divorce Financial Analysts<sup>™</sup>
- Member, Collaborative Law Institute of Minnesota
- Member, International Academy of Collaborative Professionals

## PRESENTATIONS & TRAININGS

- Speaker, *Financial Fluency for Family Lawyers*, Family Law Institute, March 25, 2024
- Speaker, *Top Tips for Establishing the Marital Standard of Living for Spousal Maintenance*, Family Law Institute, March 20, 2023
- Speaker, *5 Common Compensation Models for Businesses*, Minnesota Legal Education Virtual Event, 2022
- Speaker, *Always on Acquisitions*, Cetera Connect21 Virtual Conference, 2021
- Speaker, *Niche Marketing*, Cetera Advisor Networks Connect2Peers Conference, Chicago, IL, 2021
- Speaker, *Neutral Financial Professionals*, St. Thomas Law School, Minneapolis MN, 2020 - present
- Speaker, *THRIVE After Divorce*, Daisy Camp, Minneapolis, MN, 2019 - present
- Speaker, *Purple Cow Your Practice*, Cetera Connect 18 Conference, San Antonio, TX, 2018
- Speaker, *The Key to Strategic Planning & Marketing Execution*, AdvisorNet Financial Annual Retreat, 2018
- Speaker, *How to Up Your Divorce Financial Game Plan*, FPA Symposium, Minneapolis, 2017
- Speaker, *How to Reduce Income and Estate Taxes on Your IRA, 401(k) and Pension*, Bloomington, MN, 2017 - 2018
- Speaker, *Mix Assets and Debts and What do you Get? Quick Tips to Organizing and Understanding the Balance Sheet*, Family Law Institute, 2017
- Speaker, *Saver, Spender, Flasher, Stasher – What is your clients' money psychology and how does it affect their decision making?* CLI Annual Forum, 2016
- Speaker/Trainer, *Up Your Financial Game Plan*, Full Day Training Camp, 2016 to present
- Speaker, *How to Grow Your Practice by Focusing on a Niche Market*, Cetera Connect 18 Conference, 2016
- Speaker, *Building a Thriving Practice for the Future*, AdvisorNet Financial Annual Retreat, 2015
- Speaker, *Shark Tank: The More Collaborative Dolphin Addition*, CLI Annual Forum, 2015
- Speaker, *No Silver Bullet – Customized Solutions for Complex Financial Issues*, Collaborative Law Institute of MN Annual Meeting, 2014
- Speaker, *Feng Shui Your Finances*, Daisy Camp, Minneapolis, MN, 2014-2018
- Speaker, *Equities are a Girl's Best Friend*, Daisy Camp, Minneapolis, MN, 2014-2018
- Speaker, *Tidy Up Your Loose Ends*, Daisy Camp, Minneapolis, MN, 2014-2018
- Speaker, *Dollars & Sense*, Daisy Camp, Minneapolis, MN, 2007-2023
- Speaker, *Looking Forward Financially*, Ruth Hayden, Minneapolis, MN, 2014
- Speaker/Trainer, *Collaborative Practice: A Family Friendly Approach to Divorce*, Hennepin County Bar Association, 2012
- Trainer, *Interdisciplinary Collaborative Practice*, Lethbridge, Canada, 2011
- Speaker/Trainer, *Interdisciplinary Collaborative Practice*, Rome, Italy, 2010
- Speaker/Trainer, *Australian Collaborative Conference*, Sydney, Australia, 2009
- Trainer, *Interdisciplinary Collaborative Training*, Washington, DC, 2009
- Speaker, *European Collaborative Conference*, Cork, Ireland, 2008
- Speaker/Trainer, *IACP Annual Forum*, New Orleans, LA, 2008

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*\*\*2025 Hall of Fame Cetera Wealth Services (f/k/a Cetera Advisor Networks). Cetera Advisor Networks Hall of Fame is to reward those long tenured high achievers. Individuals who Diamond qualifiers, but also good stewards of the profession. Good partners with the Cetera home office and have the tenure and track record to show for their efforts. This award is not a guarantee of future investment success. This recognition should not be construed as an endorsement of the financial professional by any client. No compensation was provided directly or indirectly by the recipient for participation or in connection with obtaining or using this award.*