



JANE AN

WEALTH ADVISOR / PRESIDENT

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MONOLITHE WEALTH PLANNING GROUP

Jane An, Wealth Advisor and President of Monolithe Wealth Planning Group, discovered her passion for finance and helping people amid a personal tragedy at a young age.

“Losing my father at an early age in a car accident left my mother with no plan for the future and two teenage daughters. My parents had never really planned properly, really only focused on just living day to day. I was thrust into helping my mother run her business, which helped me understand at an early age: cash flow of a business, financial statements, and a wealth of information on finances. I wanted to help families plan properly so that families would not have to experience what my family went through.”

Monolithe Wealth Planning Group adopts a holistic approach to Wealth Management. Starting with clients’ goals and needs, they tailor financial plans to dreams, ensuring investments align with personal objectives. Monolithe customizes each client’s Financial Plan to what is important to their clients and applies an investment strategy that aligns with their Financial Plan.

An’s client-centric approach earned her recognition as a Top Advisor for exceptional customer service. A milestone of significant achievement lies in positively impacting clients’ lives, notably during crucial moments. An example involves helping a client navigate the unexpected loss of a spouse, transforming their financial outlook for a secure retirement.

“Due to our Financial Planning, she had financial stability and was secure in her financial future” An said. “It was wonderful to see her goals of retirement did not have to change, and she was able to continue to reach all her financial goals.” “Being able to make a difference in that way made me reflect back on the moment I had decided on why I wanted to become a Financial Planner,” she added. “Watching her enjoy her retirement with peace of mind is very rewarding for me personally.”

Reflecting on her career, An takes pride in running her successful business, while balancing the roles of Mom, Wife, and trusted financial partner to clients. “As a woman owned business, we value and look at different aspects of life in a unique way that may be a bit different than their counterpart. As a mom of a teenage daughter getting ready for high school and a son in elementary school, we juggle many hats; being able to show my children that women can flourish in their careers as well as be a dedicated mom is what I am most proud of,” An concluded.

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