

Jeanne is CFP® and a CPFA with Strategic Retirement Partners. Over the past decade she has built a successful practice serving as an investment advisor and financial consultant for families and businesses.

Jeanne's goal is to simplify advice in an over-complicated, jargon-filled industry. As an Ambassador to the CFP® Board, she has served as a resource for numerous national publications including Forbes Magazine, Time Magazine, USA Today, The New York Times, Lending Tree, Her Money and 401k Specialist Magazine. She has been interviewed by NPR, Asset TV, PBS, WBKO, Doughroller, Retireholi(k)s, The 401k Podcast, etc.

She brings an energy and simplicity to complicated topics and provides continuing education certification courses for professionals across the nation. She is a two-time presenter at the National Society of Human Resource Conference with dozens of appearances at state and local chapters. Jeanne has also provided courses for the Medical Group Management Associations, Certified Public Accountants, National Association of Plan Advisors, Advisor 2x Excel, among others.

Jeanne is recognized by industry leaders and colleagues for the original content published on social media. Topics range from personal finance tips to employer-sponsored plans and practice management advice for finance professionals. Using the hashtags #401klady and #cfppro, you can find her on social media. Her utilization of social media promotes education for clients and helps attract and retain prospects.

Jeanne's accessible way of providing virtual advice and engagement is creating a more collaborative platform for financial professionals to support each other and their clients in the digital age.



#401KLADY

Simple & Honest

