

CURTIS FINANCIAL PLANNING

SPEAKERS PRESS KIT

Cathy Curtis, CFP®

Curtis Financial Planning

FOR SAVVY WOMEN, THEIR FAMILIES AND THEIR BUSINESSES

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ABOUT CATHY CURTIS



As an independent, fee-only investment advisor and financial planner, Cathy Curtis is focused on helping women overcome their unique challenges and identify opportunities through effective financial planning.

Cathy manages clients' portfolios and has expertise in building high-return, low-volatility portfolios using a mix of actively managed no-load mutual funds, index funds and exchange-traded funds. She has qualifications and experience in cash flow analysis and budgeting, investments, retirement planning, tax planning, and real estate financing and analysis. Because she works independently—not through any bank, brokerage or insurance company—she is able to do business on her own terms. This allows her to focus on developing solutions that are best for her clients.

Cathy Curtis has been featured in the *Wall Street Journal*, *Investment News*, *Money*, *Working Mother*, *Chicago Tribune*, and *Oakland Magazine*, and has appeared on KGO-TV, ABC 7 and KTVU 2, San Francisco. She is a regular contributor to the *San Francisco Bay Area Women's Journal* and writes her own blog "Of Independent Means." Cathy also curates content for the "Women and Money" Facebook page. She is a CERTIFIED FINANCIAL PLANNER™ professional and a Registered Investment Advisor.

Education

- **University of California, Berkeley**, Bachelor of Arts, Public Policy
- **University of California, Berkeley**, Personal Financial Planning Program

Industry Affiliations

- **Member**, National Association of Personal Financial Advisors (NAPFA)
- **Member**, Financial Planning Association (FPA)
- **Member**, Financial Women's Association

Community Service and Memberships

- **The Commonwealth Club of California**, Program Director, Bay Gourmet
- **Member of the Board of Directors, CUESA** (Center for Urban Education about Sustainable Agriculture)
- **Member of Advisory Council, CAFF** (Community Alliance for Family Farmers)

Has Been Featured In

- *San Francisco Bay Area Women's Journal*
- *Morningstar Advisor blog, Markets & The Economy*
- *Investment News*
- *Money Magazine*
- *The Wall Street Journal*
- *Working Mother*
- *Chicago Tribune*
- KGO-TV, ABC 7
- KTVU 2



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PROGRAMS OFFERED

Cathy Curtis is available to speak on a range of financial and business topics, including:



The Simple Truths About Money:

Cathy will explain the simple but powerful truths about money and how to apply them to everyday spending, investment strategies, and long-term planning. Using her “10 Simple Truths,” she’ll discuss strategies and actions for a renewed sense of control over financial matters in the face of economic uncertainties.



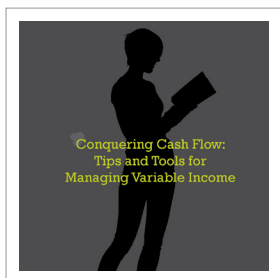
Socially Responsible Investing:

Cathy will discuss socially-responsible mutual funds, identify socially-responsible investment companies, and explain how to produce a financial plan that reflects one’s socially responsible values.



Women Entrepreneurs:

Cathy will discuss some of the unique challenges and opportunities that come with being a woman entrepreneur.



Conquering Cash Flow: Tips and Tools for Managing Variable Income

Cathy will discuss how individuals with variable or unpredictable income, such as the self-employed, can better manage cash flow and budgeting. She’ll share tips and tools to ease the pain and increase earning potential.



SPEAKING ROSTER

Cathy Curtis has shared her expertise on a range of financial and business topics, including:



“The Emerging Role of Social Media in Financial Services”

July 2011, *LinkedIn*, New York, NY

“Conquering Cash Flow: Tips and Tools for Managing Variable Income”
July 2011, *SFAR, The San Francisco Association of REALTORS®*, San Francisco, CA



“Bay Area Business Mavens: Panel Discussion with Women Entrepreneurs”

January 2011, *Hult Marketing Club*, San Francisco, CA

“The Pros and Cons of International Investing”
October 2010, *The Commonwealth Club*, San Francisco, CA



“Girls Gotta Do Business: The Rising Force of Women Entrepreneurs” - Moderator
August 2010, *The Commonwealth Club*, San Francisco, CA

“Outliers and Outperformers: Women in Fund Management” - Moderator
July 2010, *The Commonwealth Club*, San Francisco, CA



“The Simple Truths About Money”

February 2010, *National Association of Women Business Owners*, Oakland, CA

“Tips, Tools and Tricks to Make Twitter Work for Your Consulting Business”
September 2009, *Women in Consulting*, San Francisco, CA



“Financial Planning for Savvy, Socially Responsible Women”

June 2009, *Women's Environmental Network*, Oakland, CA

“Entrepreneurial Women in the Food Biz”
May 2009, *The Commonwealth Club*, San Francisco, CA



CURTIS FINANCIAL PLANNING

TO SCHEDULE A PRESENTATION CONTACT:

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