



AMY J. WOLFF, CFP® , CDFA®

CURRICULUM VITAE

POSITIONS

- Owner, AJW Financial Inc./Amy Jensen Wolff, CFP® (2002 to present)
- Co-Owner, Collaborative Alliance, Inc., Executive Suites, (Jan. 1, 2006 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 of 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 individual's 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™ professional, 1995
- Certified Divorce Financial Analyst® professional, 2002
- MN Insurance License #20001775, 1994

PROFESSIONAL CREDENTIALS AND MEMBERSHIPS continued....

- Series 7, General Securities Representative, 1993
- Series 63, Uniform Securities Agent State Law Registration, 1993
- Series 24, General Securities Principal, 1999
- 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™
- Member, Collaborative Law Institute of Minnesota
- Member, International Academy of Collaborative Professionals

PRESENTATIONS & TRAININGS

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, Minneapolis, MN, 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-present

Speaker, *Looking Forward Financially*, Ruth Hayden, Minneapolis, MN, 2014

Speaker/Trainer, Family Law Series: Collaborative Practice Fundamentals, MN CLE, Minneapolis MN, 2012

Speaker/Trainer, Collaborative Practice: A Family Friendly Approach to Divorce, Hennepin County Bar Association, Minneapolis, MN, 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

For a comprehensive review of your personal tax situation, always consult with a tax or legal advisor. Neither Cetera Advisor Networks LLC nor any of its representatives may give legal or tax advice. Asset allocation is an investment strategy that will not guarantee a profit or protect you from loss. All investing involves risk, including the possible loss of principal. There is no assurance that any investment strategy will be successful.