Business Background: Holly has been a featured speaker on the psychology of money in diverse venues, from national conferences and estate planning councils to local donor appreciation events. Quoted in the Wall St. Journal, InvestmentNews, Financial Advisor, Money, and More magazines, her area of interest is money conversations between clients and professionals. Her 2013 book, *The Mindful Money Mentality*: *How to Find Balance in Your Financial Future*, was called "..a great addition to an advisor's shelf, as well as a hugely valuable book for clients who are at a personal and financial crossroads" by NAPFA Advisor magazine.

Her free monthly e-letter, "The View from the Porch," received the All Star award from Constant Contact for its content in 2012 and 2013.

Before starting a fee-only financial planning practice in 2006, Holly spent 21 years in banking, primarily with First Union/Wachovia (now Wells Fargo), where she served as a Senior Vice President in the Private Wealth Management division. During her banking career, she was nominated by one of her clients and featured in Inc. magazine as a "Banker You'll Love."

Education: Holly holds 2 master's degrees from the University of South Florida: an MBA in Finance and MIS; and an M.A. in Economics. She received her B.A. in Economics from Davidson College in 1986 and CFP® certification in 2004.

Personal: A Florida native who studied in India, Holly enjoys cooking Asian cuisine, hiking, birding, and snowskiing. She has no kids, no pets, and all plants entrusted to her care have passed on.