

Business Background: Holly has been a featured speaker on the psychology of money in diverse venues, from university classrooms to national conferences. Quoted in the Wall St. Journal, InvestmentNews, Financial Advisor, Money, and More magazines, 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*,” has been named an “All Star” by Constant Contact every year since 2012. In January 2016, she published an e-book, *How Does Your Money Flow? A Guide to Common Saving, Spending, and Sharing Decisions*. Her forthcoming e-book is titled *Financial Planning at the End of Life*.

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 (1996); and an M.A. in Economics (2007). She received her B.A. in Economics from Davidson College in 1986 and CFP® certification in 2004.

Volunteer: Holly currently chairs the Leadership Development Committee for the National Association of Personal Financial Advisors (NAPFA), following a term as the Chair of its South regional board. She has served as an Area Governor for the Tampa Toastmasters district. She also served on the boards of the Child Abuse Council (now Champions for Children), PACE Center for Girls, and the Florida Orchestra.

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.