

Mindy Neira, CFP, ChSNC (LGBTQ Financial Planner)



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As a CERTIFIED FINANCIAL PLANNER™ and Chartered Special Needs Consultant®, I help individuals and families who have planning needs centered around disability or other medical conditions. I also partner with those who identify as Lesbian, Gay, Bisexual, Transgender, or Queer (LGBTQ).

Typically, people come to me because they have unique planning needs, but they aren't sure how to address them. Other times they have an idea of what they need to do but are overwhelmed by everything else going on in their lives. Financial planning tends to take a back seat. And many times, they are coming to me because they are worried about where their financial future lies.

That's where I come in. I help my clients assess their financial landscape as it stands now. I work with them to organize and prioritize their goals, identify strengths and areas of improvement, and most importantly implement changes and re-visit their plan regularly. I would describe myself as my clients' personal CFO.

*Our firm operates on a fee-only/commission-free model that puts our clients' needs

ahead of our own.

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