



# Kathy Longo CFP<sup>®</sup>, CAP<sup>®</sup>, CDF<sup>®</sup>

EXPERIENCED FINANCIAL ADVISOR | ENTREPRENEUR | AUTHOR | SPEAKER



Kathy Longo is a Certified Financial Planner<sup>®</sup> practitioner, Chartered Advisor in Philanthropy<sup>®</sup>, and a Certified Divorce Financial Analyst<sup>®</sup> with over twenty-five years of wealth management experience. She is the founder and president of Flourish Wealth Management, an independent boutique wealth management firm in the Minneapolis area.

Before launching Flourish in 2014, Kathy worked at companies in both Chicago and Minneapolis including Accredited Investors, Family Financial Strategies, American Express Trust Company, KPMG, Deloitte & Touche and CCP Financial Planning. She has a degree in Financial Planning and Counseling from Purdue University.

Kathy has recently made her debut as an author with the book *Flourish Financially: Values, Transitions, and Big Conversations*, which encourages a holistic and personalized approach to finance, discussing the fiscal and psychological aspects of big transitions and life events. Kathy prompts readers to reflect on their unique money story and advises on how to start productive conversations about money with those closest to them in order to create a plan that is best for everyone.

Kathy has been quoted as a trusted expert in multiple national and local publications including the Wall Street Journal, New York Times, Money Magazine, More<sup>®</sup>, Ladies Home Journal, USA Today, Real Simple, Bloomberg Wealth Manager, Investor's Business Daily, the Star Tribune, St. Paul Pioneer Press, Chicago Tribune, Journal of Financial Planning, Financial Advisor, and Investment News, and has been a guest on several podcasts including the Financial Advisor Success Podcast by Michael Kitces.

Kathy serves as chairperson of the executive board of directors for Common Hope to help provide Guatemalan children and families with choices and opportunities and on the board of directors for the YWCA of Minneapolis to eliminate racism and empower women and girls. She also serves on the Professional Advisor Committee for the Women's Foundation of Minnesota.

Kathy is a proud member of the Women Presidents' Organization. She previously served on the board of the National Financial Planning Association and as president of the Minnesota Financial Planning Association.

Kathy lives in Minneapolis with her husband, Jay Pluimer, and their three children, Madeline, Fernando and Grace.

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