



Kathy Longo CFP[®], CAP[®], CDFIA[®]

EXPERIENCED FINANCIAL ADVISOR | ENTREPRENEUR | AUTHOR | SPEAKER

Her unique talent lies in taking the intricacies of finance and transforming them into simple, easily digestible concepts. Kathy has an uncanny ability to ask the perfect questions, unlocking fresh opportunities and crafting optimal strategies for her clients' success. Her role in their lives is more than just a job; it's a genuine honor and privilege. Kathy takes pride in being the trusted guide on their financial journeys, ensuring that her clients flourish in every sense of the word.

Kathy's journey as an author began with her book, [Flourish Financially: Values, Transitions, and Big Conversations](#). What makes this book so special is its warm and friendly tone. It doesn't overwhelm with jargon; instead, it invites readers into a conversation about their financial journey. Kathy encourages readers to reflect on their unique money story and gently guides them on how to open productive discussions about money with their loved ones. It's a book that not only informs but also puts people at ease.

Taking her passion further, Kathy transformed the wisdom from her book into an inspiring weekly mini-podcast and an engaging Alexa Skill called [Flourish Financially with Kathy Longo](#). Through these friendly platforms, Kathy continues to make finance accessible and enjoyable for all, helping her audience thrive financially while building stronger connections with their communities.

Kathy lives in Minneapolis with her husband (and co-worker) Jay Pluimer. She is also the proud mom to Madeline, Fernando and Grace.

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EDUCATION & CERTIFICATIONS

- Purdue University, Degree in Financial Planning
- Certified Financial Planner (CFP[®])
- Chartered Advisor in Philanthropy (CAP[®])
- Certified Divorce Financial Analyst (CDFIA[®])

WORK EXPERIENCE

- Accredited Investors
- Family Financial Strategies
- American Express Trust Company
- KPMG
- Deloitte & Touche
- CCP Financial Planning

HONORS & RECOGNITION

- Investopedia Top 100 Wealth Advisor, 2019, 2021, 2022, 2023
- "Five Star Wealth Manager Award" 2009, 2010, 2011, 2017, 2018, 2019, 2020, 2021, 2022, 2023.
- "Top 50 Women in Wealth Management" Wealth Manager Magazine, 2009
- "Future Star of The Financial Planning Profession" Financial Advisor Magazine, 2004
- "One of the nation's Top 250 Wealth" Advisors Worth Magazine, 2008
- "Outstanding Professional Alumni Award" Purdue University Consumer and Family Sciences School, 2004

QUOTED AS A TRUSTED EXPERT IN MULTIPLE NATIONAL AND LOCAL PUBLICATIONS INCLUDING:

The Wall Street Journal, New York Times, Investopedia, Reader's Digest, NASDAQ, Money Magazine, More[®], Ladies Home Journal, USA TODAY, REAL SIMPLE, Bloomberg Wealth Manager, WalletHub, Investor's Business Daily, the Star Tribune, St. Paul Pioneer Press, Chicago Tribune, Journal of Financial Planning, Financial Advisor, and Investment News, and more.

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