

it's just money: confessions, revelations, and insights

“Money is one of the most emotional subjects and aspects of our lives, deeply impacted by our up-bringing and our own psyches. It can be one of the most empowering or destructive aspects of any human’s life! Karen “gets this,” and she has the passion, intellect and dedication to deliver this most important message. I’ve been a financial advisor for over 25 years, and I know how challenging it is to help people overcome their emotional baggage. Karen is not only passionate about her subject, but she is also an electrifying and captivating speaker.”

– Don Patrick, MBA, CFP®, Managing Director, Integrated Financial Group

With great compassion and insight gained from over 20 years of helping individuals and couples make money decisions, Karen helps her audience uncover the hidden secret to financial independence and freedom from financial stress.

Karen takes a poignant subject—the emotional side of money—and infuses it with humor, helping her listeners embark on a journey towards a deeper understanding of the many roles money plays in their lives.

By sharing her own money story and those of countless others, Karen provides examples that most of us can identify with and relate to. In a candid, matter of fact way, she uncovers the secrets, feelings and attachments that each of us hold in relationship to money. Karen helps her audience recognize the rationalizations and excuses many of us use to justify our often irrational decisions we make with money.

Karen is a gifted speaker and motivator. She gives her listeners not only a new understanding of their money behavior, but also the motivation and inspiration to change. She offers specific steps to forge a new relationship with money and ultimately achieve financial success.

Call today to book Karen to speak at your next event!

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Partial Client List

- Financial Planning Association
- Keller Williams Realty
- Pacific Life Insurance Company
- Atlanta Business Women’s Association
- Georgia Society of CPA’s
- Buckhead Business Network
- Securities America National Conference
- Del Webb Communities
- 7th Annual Circle of Sisters Event/NY
- Key Bank, Denver



Karen J. Lee

CFP®, CLU, ChFC, MSFS, AEP

Karen is in demand as a speaker, appearing both at industry and consumer events. She has addressed audiences of financial advisors at events held by the Financial Planning Association (FPA), The GA Society of CPA's, and at Broker/Dealer conferences. She has also presented to local business associations, faith communities and women's organizations. She is currently serving as the financial spokesperson for the Wise Women Speak Foundation, a non-profit organization promoting building wealth for women, girls and families.

Karen speaks enthusiastically on the following topics:

- It's Just Money, So Why Does it Cause So Many Problems?
- What Affects Our Attitudes Toward Money
- Money Baggage: Yours, Mine and Ours
- Six Steps to Transform your Money Life

For Financial Service Firms:

- You are the Message
- Sometimes I feel like a Therapist!

She has recently published her first book titled; *It's Just Money, So Why Does It Cause So Many Problems?* In this "Chicken Soup for the Soul" style book, Karen teaches how our relationship with money can be our greatest tool to financial success, or our worst enemy.

Her message resonates with her audiences. Whether it's helping colleagues understand the importance of connecting with their clients about money baggage they may carry, or helping consumers recognize how they may be self-sabotaging their carefully constructed financial plans - Karen is an engaging, thought-provoking speaker.

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Karen

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Education/Certification

- M.A., Tulane University, Architecture
- M.A., American College, Financial Services
- CERTIFIED FINANCIAL PLANNER™ Professional
- Chartered Life Underwriter
- Chartered Financial Consultant
- Accredited Estate Planner

Media/Presentation Experience:

- Regular guest expert on CNN
- Published Articles
 - MSN Money Central
 - Financial Planning magazine
 - Financial Advisor magazine
 - CNBC.com
 - Forbes, Kiplingers
 - National Underwriter
 - AICPA Wealth Management Insider
 - Parenting magazine - Family Budget Bootcamp advisor
 - Huffington Post
 - Ladies Home Journal
- The Wealth Channel - featured advisor
- Extremely articulate, professionally-trained public speaker
- Media-trained professional
- Author of the book: *It's Just Money, So Why Does it Cause So Many Problems?*