Contact

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www.linkedin.com/in/elainekingcfp (LinkedIn)
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Top Skills

Public Speaking

Entrepreneurship

Investments

Languages

Portuguese (Elementary)

French (Elementary)

English (Native or Bilingual)

Spanish (Native or Bilingual)

Farsi (Elementary)

Certifications

Certified Divorce Financial Analyst (CDFA)

Florida Supreme Court Family Mediator

Certificate in Family Business Advising (CFBA)

Toastmasters Competent Communicator Distinction

Certified Financial Planner (CFP)

Honors-Awards

Latino Book Award 2013 Best Parenting

Tumi de Oro Excelencia a la Comunidad

Top 25 MostPowerful Latinas

Most Influential Financial Advisor for 2020

Investopedia Top 10 Financial Advisors of 2023

Publications

La Familia y El Dinero Hecho Facil

Elaine King, MBA, CFP®

Investopedia Top 10 Financial Advisor of 2023 | Speaker | Author ♟I've helped >100 family enterprises with legacy, generational wealth, impact and governance. I am a Family Financial Planner(TM).

Miami, Florida, United States

Summary

I am grateful to be one of the 25 Most Influential Hispanic Women of 2017 and Top 10 Most Influential Financial Advisors of 2023 for my impact on family finances. Here are 7 things that many do not know about me:

1. Studied and grew up in Austria, Canada, Japan, Mexico, Peru, and different cities in the United States. Love flying ultralights and land in the ocean, playing golf (never like at 14), scuba diving looking for turtles or sharks, and doing workshops for children teaching them how to make, save, grow and share their money.

2. #Started my career on Wall Street advising a group of 5,000 financial advisors and became the manager of an advisory service with assets of $ 13 billion dollars. Then led as Partner, Director, and VP of Bessemer Trust with AUM $ 100BN, Royal Bank of Scotland 'Coutts Division, and WE Family Offices.

3. Had the opportunity to design and implement 3 multi-family offices (private label) developing financial plans for more than 1,200 families focused on legacy, family governance, succession, and social impact inspired by the NextGen. Have been fortunate to work with more than 100 multigenerational companies creating strategic plans for the family.

4. Peruvian born and driven to write 8 books, 2 of them awarded bestsellers; “Family and Money Matters Next Gen” and “Family and Money Made Easy. Been fortunate to deliver more than 350 lectures in 35 cities. and participate often as a financial expert in CNN, Telemundo, Gestión, WSJ, and Forbes.

Take the Pledge to Talk Finances with your Children

Money is King

Los 10 Mandamientos de la Familia Empresaria

Get help raising grandchildren

5. In 2013 I founded Family & Money Matters ™ with the mission of strengthening human and financial capital to achieve family financial harmony. created a family financial institutional program with KPIs that has transformed thousands and courses in finance for entrepreneurs with more than 12,000 students.

6. ♝ Love to learn; have an MBA with a focus on Asia, a BBA with a focus on Europe, a Postgraduate in Family Systems Bowen in Georgetown. Certified Financial Planner (CFP®) and an ambassador. FFI Certified Advanced Family Business Advisor (ACFBA ™), FL Supreme Court Family Mediator, and Certified Coach (ICF)

7. What's my mission? make money a positive force in your life, w/sustainable growth, health, and financial purpose in the family unit. My approach is to support family businesses to have a healthy financial relationship and build bridges to keep the family together, creating a sustainable family financial strategic plan for the next generation ... (the story continues...).
Let's work together!

Experience

Family and Money Matters Institute™
Founder & CEO
April 2013 - Present (10 years 5 months)
Miami, FL

I founded the Institute with the mission of strengthening the human and financial capital in families and their businesses.

♝ Create family strategic plans for + 1,200 families to achieve family financial harmony

♝ Design online financial well-being course with > 12,000 students

♝ Develop +250 workshops and conferences in 35 cities for diverse audiences

♝ Worked with > 100 family businesses to build solid family financial governance

♝ Advise +80 corporations such as EY, PWC, KPMG

SHECHTER & EVERETT, LLP
External Director
February 2020 - Present (3 years 7 months)

I work with women in transition to empower them before, during, and after the separation process with understanding, organization, and control of the well-being of their finances

♝I lead the financial planning center of S&E who has worked with 8,000 clients in transition

♝We are pioneers in creating the first virtual Summit to help couples in transition

♝I use my training as a Florida Supreme Court Family Mediator and CDFA ™ certification to reach our client's goals

WS USA

European Family Office Interim CEO & COO

December 2017 - August 2019 (1 year 9 months)

Miami/Fort Lauderdale Area

♝Advised and executed on a strategy to expand $30B NW European Family Business and launched its Latin American HQ in Miami

♝Led family enterprise owners with U.S. operations, registrations, regulations and compliance responsibilities and the SEC

♝Managed, trained, and hired founding members to operate the business including corporate finance and technology

WE Family Offices

Family Office Director & Partner of Education and Governance

July 2013 - June 2016 (3 years)

Miami/Fort Lauderdale Area

♝Built governance structures for a group of 75 family businesses that typically includes a family protocol, a shareholder's agreement, a mission statement, and a conflict resolution policy. Last family profile: $1billion in revenue, 40 members, 4 generations.

♝Designed educational programs for families for 5 to 80-year-old members in planning areas such as finance, succession, career, conflict resolution, communications, values, protocols, decision making, trusts, and shareholder agreements.

Bessemer Trust

Family Office Vice President

January 2012 - June 2013 (1 year 6 months)

Miami/Fort Lauderdale Area

♝ Developed and maintained 30 client relationships with AUMs over $1 billion through proactive client communication and coordinated delivery of planning services to individuals, families, trusts, and foundations.
♝ Managed the onboarding and planning process for each client relationship with the following teams: Tax Planning, Investments, Legacy Planning and Trust Administration, Alternative Asset Management Group, Philanthropic Advisory Services, Property and Casualty Advisory Services, Equity Risk Management and Custody.
♝ Implemented investment strategies which include evaluating current asset allocation and entities, creating a target investment plan and ownership, designing asset allocation, and overseeing investment transition and analysis.
♝ Prepared initial and annual trust reviews including the request to Trust committee for all discretionary distributions from trusts and for all special investments in the trust, including offshore trusts, irrevocable insurance trusts (ILITs), charitable remainder trusts (CRTs), charitable lead trusts (CLTs) and private foundations.

The Lubitz Financial Group
Managing Director, Wealth Planning
February 2011 - January 2012 (1 year)

Gibraltar Private Bank & Trust
Multi Family Office Vice President, Director of the Wealth & Well-Being Institute
March 2004 - February 2011 (7 years)

♝ Hired and trained a unique team of wealth planning experts to serve as client partners resulting in the creation of the Wealth and Well-Being Institute.
♝ Created and structured a flexible advisory platform to improve the profitability and long term retention of advisory services
♝ Introduced private bankers, wealth managers, and investment professionals to methodologies for effectively measuring the revenue stream, encouraging the optimum planning allocation required for specific clients needs (Client reviews to date: 1,000+)
♝ Conduct wealth planning deliverables which include asset allocation analysis, retirement planning, estate planning documentation review, education funding, and property and life insurance evaluation to ensure that these match current client objectives. (Change in net income increased by 50%)

Coutts

Assistant Vice President, Investment Manager
April 2000 - March 2004 (4 years)

♝Conducted sales campaigns with private bankers for new products which raised $25 million in Hedge Funds, $20 million in Latin mutual funds and $18 million in Venture Capital and Capital Protected Products
♝Developed monthly sales and revenue analysis reports of 26 private bankers and advised the CEO of new strategies to increase revenue and improve sales management. Exceeded target by 10%
♝Increased brand awareness in Latin America by improving product marketing reports, investment seminars and advertising. Increased sales by 20%
♝Created investment strategies to maximize returns for portfolios est. at $8 billion

Salomon Smith Barney Holdings Inc. (NYSE: SB)
Investment Advisory Manager
January 1996 - January 2000 (4 years 1 month)

♝Managed all functions of Sales & Marketing desk for $13 billion wrap fee mutual fund product
♝Raised $25 million in mutual sales by conducting investment seminars for Financial Consultants
♝Developed product ideas, marketing strategies, seminars and mutual fund selection research
♝Recruited, interviewed, hired, and trained a team of 8 Sales & Marketing associates
♝Developed marketing strategies for a $268 million offshore advisory service with a focus on Latin America
♝Advised over 5,000 Financial Consultants in a market-leading $13 billion investment advisory service
♝Reduced distribution cost of TRAK software through the use of internet bulletin boards
♝Trained employees on the intricacies of mutual fund service via telephone conferences and seminars

Education

Harvard University
Family Engagement in Education · (August 2020 - October 2020)

Babson College

Certification for Entrepreneurship Educators, Entrepreneurship/Entrepreneurial Studies · (January 2023)

University of Miami

Certified Professional Coach Certificate Program · (2015 - 2016)

The Bowen Center for the Study of the Family at Georgetown

Post Graduate Program in Bowen Family Sytems Theory and its Applications · (2009 - 2010)

Florida International University

Executive Certified Financial Planner Certificate Program (CFP®) · (2004 - 2005)