



**Catherine Allen-Carlozo, CFP®, RICP**  
FINANCIAL ADVISOR



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Schedule a call with me:  
<https://calendly.com/hfm360/15-minute-call-with-catherine-allen-carlozo>

[www.HFMadvisors.com](http://www.HFMadvisors.com)



## BIOGRAPHY

Catherine Allen-Carlozo, is deeply compassionate and driven to educate and empower people to make informed decisions in their financial lives. Her purpose is to help her clients thrive and enjoy greater well-being through acting as a positive and engaging advisor. One of Catherine's expertise is working with women in transition: widows, divorcées, and those re-joining or retiring from the workplace. It is her passion to change the conversation about personal finance for women from "I hope that I can" to "I know that I will" in order to help them experience lasting financial freedom. She strives to cultivate long-lasting relationships and bring peace of mind to every client.

## PRESENTATIONS

### Unique Financial Challenges for Women

In this presentation, Catherine discusses financial challenges that can be unique to women and how to prepare for unexpected and expected events. She shares a story and how the story can change through proper planning and guides her audience with action steps they can take immediately. As women in transition move from "The Known" (the life she's lived) to the "Unknown" (the life she will have), Catherine provides education and expertise on how to prepare for the transition.

### Are You Controlling Your Money or Is Your Money Controlling You?

In this interactive presentation, Catherine will engage the audience to find their relationship with money, their true purpose of money, and how to understand and overcome the negative beliefs they may have about money that can interfere with true investing peace of mind. Through an exercise, Catherine will help the audience create positive beliefs about money and how they can take control of their financial future.

## PREFERRED AUDIENCE

Executive women, business owners, women in transition, audiences that can implement action and see value.

## PAST PRESENTATION REFERENCES

SJWIB (South Jersey Women in Business)

Virtua

CareKinesis

NAWBO (National Association of Women Business Owners)

Women Attorney Networking Group (Philadelphia Chapter)

