

KELLEY C. LONG, CPA/PFS, CFP®

PERSONAL FINANCE SPEAKER,
WRITER, COACH & CONSULTANT



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About Me

With a career that includes roles in public accounting, marketing, financial coaching and wealth management, I've facilitated hundreds of financial workshops and webinars for employees and clients, presented at multiple industry conferences and appeared on television, radio and podcast interviews. My life's mission is to de-mystify money and enable my peers to join me. While I speak on a wide variety of topics pertaining to personal finance, I have a particular interest in increasing healthcare financial literacy to help mitigate the rising costs of healthcare while also maximizing wealth-building opportunities that many people miss. My talks are customized to the audience, whether speaking to industry peers or non-financial industry folks, and are always educational, empowering and entertaining.

SAMPLE SPEAKING TOPICS



Maximizing the Unique Benefits of
Health Savings Accounts



Financial Wellness for Women: Making
the Most of Your Money



Healthcare Planning for Early Retirement



Facilitating Conversations Around Client
Goals & Values: Starting the Conversation



Advanced Financial Planning Strategies to
Retire with Confidence

TESTIMONIALS



Kelley was great, so relatable. Great practical examples and insights. Appreciated that while she mentioned the advisor business benefits to including HSA advice, it was not the "purpose" of her presentation.



Kelley was informative and empowering. She takes big concepts and breaks them down into actionable bite-sized pieces which made a concept that can be extremely overwhelming feel more straightforward and manageable, sometimes even fun!

FEATURED IN THE PRESS

**The
New York
Times**



WSJ