MEDIA KIT

Mary Beth Storjohann

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ABACUS

BIOGRAPHY

Mary Beth Storjohann, CFP®

Co-Chief Executive Officer

ABACUS WEALTH PARTNERS

Mary Beth Storjohann is Co-CEO of Abacus Wealth Partners. She is a CERTIFIED FINANCIAL PLANNER™, author, speaker and podcast host with 20 years of experience in the financial services industry. She joined Abacus in 2019 as Chief Marketing Officer after successfully launching and growing her own RIA firm and in 2022 was appointed as Co-CEO.

A believer that "actions speak louder than words," Storjohann is known for sparking conversations and change in the financial services industry by leaning into uncomfortable dialogue and decisions in order to leave the world and our industry in a better place. She is a fierce advocate for women, diversity, equity & inclusion, aligning your money with your values, and making financial advice accessible to underserved populations.

Mary Beth has appeared on NBC and has been featured in major media outlets such as The Wall Street Journal, Glamour, NPR, The New York Times, Women's Health, Cosmopolitan, CNBC, Forbes, and more.

If you can't find Mary Beth crunching numbers on her trusty HP-12C financial calculator, you can find her on her Peloton, reading a book, cornered by a 6 & 9-year-old who are constantly demanding snacks, or having an adventure in or around San Diego with her family.

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SOCIAL twitter.com/marybstorj linkedin.com/in/marybethstorjohann

SPEAKING TOPICS

Put Your Money Where Your Heart Is and #WorkYourWealth

You can do it all. You just can't do it all at once. Learn how to set and prioritize financial goals that are in line with your values and what you're trying to accomplish.

» How to manage, spend and save your cash flow.

» What it means to measure your financial health (and what the numbers tell you).

» You may eventually want to stop working (or at least have the option). Learn how to plan for it.

» Meet Compound Interest, your money's best friend.

» Navigating financial risks and protecting yourself.

Work Your Wealth in Business & Life

As an entrepreneur, you're constantly juggling priorities between work and life. In this talk learn how to keep your financial life in check while navigating your professional and personal worlds.

» Why your business and your personal goals are intertwined.

» Business cash flow management do's and don'ts.

» How to manage your finances on a variable income.

» Saving for retirement as an entrepreneur. Learn the accounts available to you to stash away for your future self.

» Tips and action items for keeping your finances organized throughout the year.

» Financial planning concerns and risks for small business owners.

7 Money Beliefs Holding You Back

We all have beliefs about money. Learn how to identify and overcome misleading perceptions that prevent you from reaching your full financial potential.

» What money scripts are and how they were formed.

» The scripts the are negatively impacting your financial health.

» 7 common money mindsets that hold people back.

» Question to answer to break through negative thought-patterns.

» Practical, easy-to-implement actions to overcome your money blocks.

SPEAKING TOPICS

Amplify Your Retirement: Accounts, Savings & Investments

Everything you should consider when it comes to building your retirement strategy.

» The benefits of starting today vs. the drawbacks of waiting to save.

» The types of accounts available to you to save for retirement.

» Identifying the best retirement account for you.

» What questions to ask when it comes to investments.

» The difference between stocks, bonds, mutual funds and why it matters.

» Breakdown of key terms you should know to feel empowered around your money.

Personal Financial Planning for Entrepreneurs: Before, During and After Your Business

Get clear on your financial priorities, set a plan in motion for efficiently managing your money and ensure you're taken care of for the future.

» You want to launch your business, but you're not sure if your finances are on track.

» Your company is growing, but you're unsure of how to juggle personal and business finances, where they intersect and how to ensure you're covered for today, tomorrow and the future.

» Ditch the stress that comes with managing and building your wealth and learn what questions you should be asking, the correct actions to take, and just what kind of goals really matter.

Additional Topics Within the Financial Planning Profession:

» Leveraging Your Expertise to Get the Media Buzz You Deserve

» Financial Planning for the Next Generation: What Gen X & Y Clients Really Want

» Running a Virtual Financial Planning Practice: It's not that Complicated

» Psychographics over Demographics: How to Connect with Your Niche

» Build Your Brand: How to Amplify Your Online Presence

» The Power of Masterminds and Study Groups in building your firm

» Writing a Book to Grow Your Advisory Practice

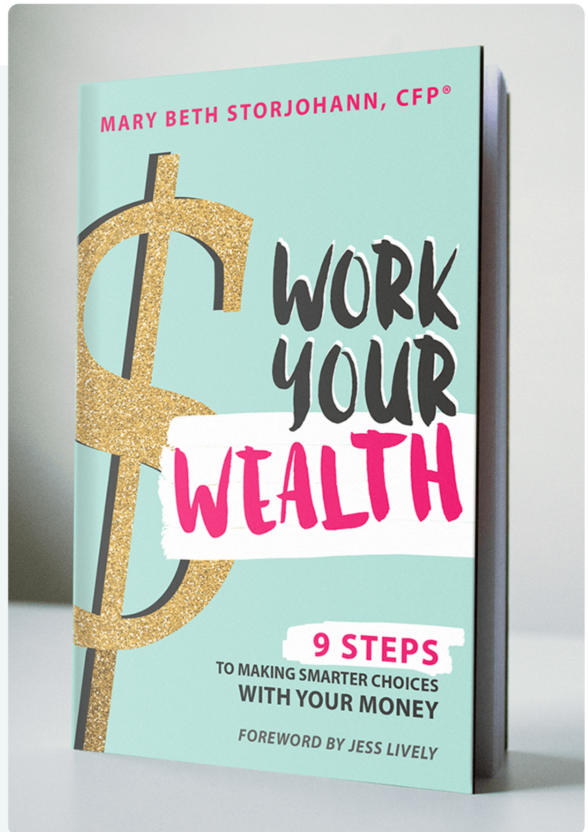
» Business Planning 101 for Launching Your Financial Planning Practice

AUTHOR

Work Your Wealth

9 Steps to Making Smarter Choices with Your Money

by Mary Beth Storjohann



Imagine ditching the stress around your finances once and for all. Think about what your life would be like to have control over your money instead of feeling like it has control over you.

Work Your Wealth isn't your traditional personal finance book. Mary Beth Storjohann, CFP®, speaker and writer, makes it her mission to cut through the crap, toss the fancy lingo, make money relatable, and breaks down specific steps and to-dos along the way to provide you with confidence and clarity in your financial life.

Work Your Wealth makes taking control of your finances exciting and easy to do. It provides an organized plan of attack that covers everything from setting goals, budgeting, paying down debt, investing, planning for retirement, using credit wisely, and more. Not to mention a whole chapter that covers your real life money questions. In addition, Mary Beth wraps up each chapter with a list of detailed, actionable *Money Moves* to help you build the foundation you need to create your own financial plan.

Work Your Wealth educates, motivates and empowers you to gain a financial education, to kick your bad money habits (and your debt) to the curb, to step up and invest in yourself, and most of all to celebrate your wins along the way.

If you're ready to take control of your money, *Work Your Wealth* is your ticket to a new financial life.

SPEAKING RESUME

Previous Speaking Appearances

- NAPFA – The National Association of Personal Financial Advisors
- California State University San Marcos
- FPA – Financial Planning Association
- Craft Industry alliance
- The Group Practice Exchange
- Atlantic Trust Private Wealth Management
- Permaculture Voices
- Wounded Warrior Project
- XY Planning Network
- NAWIC Builds
- InvestmentNews
- Women's Money – A New Vision for Women and Money – www.womensmoney.org
- Investopedia
- WISE – Women in Sports and Events – San Diego
- Junior League of San Diego
- zynnyme – private practice experts
- UC San Diego
- FinCon

Featured In

- Forbes
- CNN Money
- NBC
- SELF
- The New York Times
- Money
- Cosmopolitan
- The Wall Street Journal
- Yahoo! Finance
- Business Insider
- U.S.News & World Report
- Glamour
- Women's Health
- CNBC
- Brides