



# Elaine King

## *Family & Finances*

### Media Kit 2022

# Respected and inspirational financial leader



Reaches 15 million households monthly through television, radio, and press.

1.

2.

Has led audiences of more than 375,000 people in 250 conferences and seminars in 35 cities of Latin America, Europe, and the United States, with 90% positive results.



3.



Served as manager at Coutts Royal Bank and Bessemer Trust, largest family office in the world, impacting 1,200 families and 100 multigenerational businesses.

4.

Award-winning author of 8 published books by Penguin, Random, Santillana, and Harper Collins.



5.



Entrepreneur and Founder of the Family and Money Matters™ Institute, with more than 12,000 students.

6.

Featured by the magazine *People in Español*, in the exclusive list of the 25 Most Powerful Latina Women in the United States. And in 2020



7.

MBA from Thunderbird, Postgraduate in Family Therapy, CFP Board Ambassador, Family Mediator, and Certified in family business, finances, education AFBA™, CFP®, CDFA™, CFEI™, ICF and coach.







# Positive results with a diverse & multicultural influence



## YouTube

+ 2.5M impressions yearly,  
300K views quarterly



## Website

+ 30K visits monthly



## Institute

+ 12K students



## Instagram

+ 13K followers



## LinkedIn

+ 2K followers



## Facebook

+ 22K followers





# International speaker with excellent evaluations



## Impact & influence

Has conducted presentations on fun and practical strategies in 35 American and Latin American cities.



## Training and personalization

Has trained thousands of executives, positively impacting their vision, and trainers of companies with 10,000 employees.



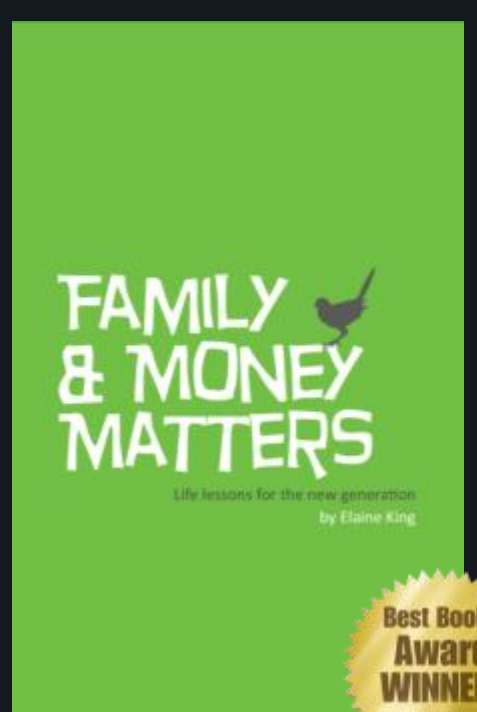
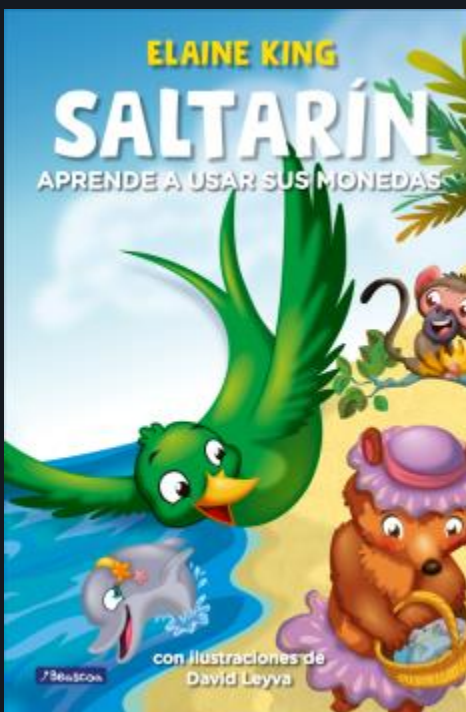
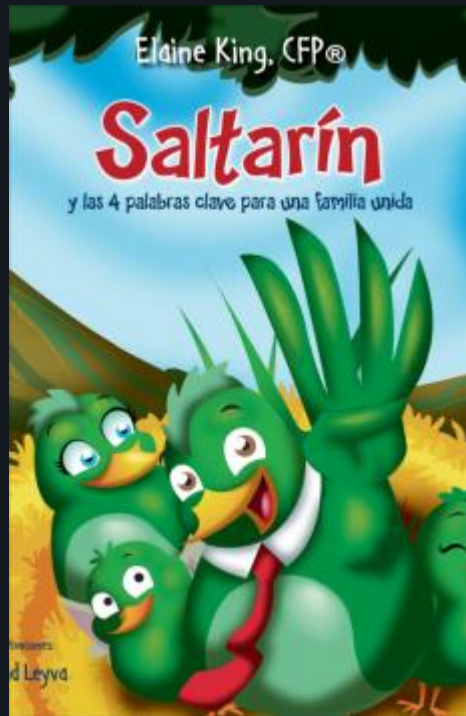
## Diverse audiences & Communities

Has impacted the diverse communities, inspiring them to transcend. Elaine received the Tumi USA Award for her achievements in the community.





# Best-selling author



## BOOKS

- *Saltarín y las cuatro palabras para una familia unida* (In English: *Saltarín and the Four Key Words to a United Family*)
- *Tu plan de Vida USA - Hecho Fácil* (In English: *Your USA Life Plan - Made Easy*)
- *Los Colores de tu Dinero* (In English: *The Colors of Your Money*)
- *Parejas Felices, Cuentas en Orden* (In English: *Happy Couples, Accounts in Order*)
- *Saltarín aprende a usar sus monedas* (In English: *Saltarín Learns to Use Coins*)
- *Los 10 Mandamientos para toda familia empresarial* (In English: *10 Commandments for Every Family Business*)

## AWARDS

### Winner of Best Latino Award

- Family and Money Matters – Next Generation
- La Familia Y El Dinero Hecho Facil



Penguin  
Random  
House



HarperCollins

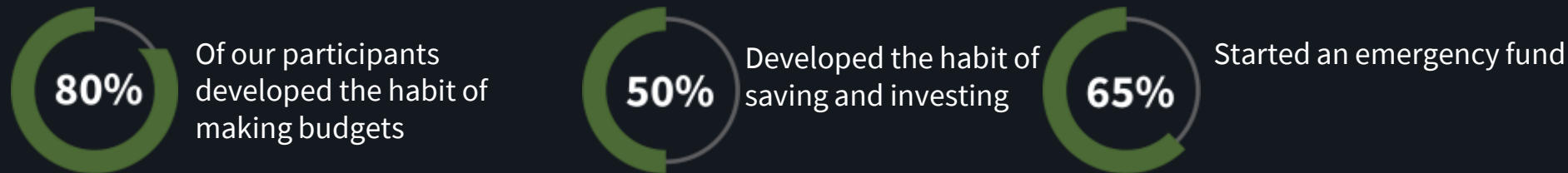


SANTILLANA





# Founder of the Family and Money Matters™ Institute, a pioneer in family financial education



## Sample Programs

- |   |   |
|---|---|
| <b>1</b> 10 Commandments for Every Family Business                  | <b>4</b> Couples and Money – 5 common mistakes        |
| <b>2</b> Developing Millionaires                                    | <b>5</b> The 7 Colors of Your Financial Health        |
| <b>3</b> Improve your Productivity and Reduce Your Financial Stress | <b>6</b> Reactivate the Finances of Your Stakeholders |





# Media reference for the U.S & Hispanic market



Reaches 15  
million people  
every month



Experience with  
+100 interviews



Diverse audience  
in 17 countries





# Media reference for the U.S & Hispanic market



Monthly columnist in Peru and the United States



+ 1 million impressions in press



+120 media interviews

THE WALL STREET JOURNAL

Forbes

El Comercio

Bloomberg Businessweek

Newsweek

FT

FINANCIAL TIMES

The Miami Herald

HispanicBusiness MAGAZINE

VANIDADES

NASDAQ

Hoy

Carelas

Smart Money

People EN ESPAÑOL

InvestmentNews

GESTIÓN

EL TIEMPO.COM

intuit mint.

Finanzas Personales



## Los millennials, el secreto de la supervivencia para las empresas familiares

Las claves para prevenir y mitigar los conflictos son: planeación financiera, involucramiento de los más jóvenes e impacto social sostenible. Asimismo, se hace preciso fortalecer las habilidades "blandas" e inteligencia emocional.



**Longo plan.** "Una empresa familiar tiene más poder de planeación a futuro".

**Liderar con el conflicto.** Ahora, ¿qué ocurre cuando el conflicto en la empresa se convierte en una crisis? La clave está en la comunicación y en la capacidad de negociación. La clave está en la comunicación y en la capacidad de negociación. La clave está en la comunicación y en la capacidad de negociación.

## "Es necesaria la igualdad de género en la economía familiar"

El rol de la mujer en la economía familiar es fundamental. Su participación activa en la toma de decisiones y en la gestión de los recursos es clave para el éxito de la empresa.

## The Role of Women in Family Businesses

Women play a crucial role in family businesses. Their leadership and decision-making skills are essential for the long-term success of the company.



## Adiós al estrés antes del inicio de clases

**Planificación**  
Consejos para enfrentar la temporada escolar sin morir en el intento.

Patricia Castañeda Alva, experta en finanzas familiares, explica a El Comercio que si bien "la educación debe verse siempre como una inversión y no como un gasto", esta "debe ser planificada correctamente". Ella recomienda que si uno planifica, la llegada de la temporada de clases lo tendrá preparado. "Lo ideal para la familia es que dentro del presupuesto anual se coloque como un gasto fijo el monto que se necesita para adquirir todos los útiles escolares", comenta.

## Las 3 claves de las finanzas en pareja

Materializa los sueños propios y los compartidos con estos consejos de Elaine King, experta en planificación financiera.

Cuando se decide tener vida en pareja, uno de los factores que menos se toma en cuenta es cómo será la dinámica financiera.

## La Caja en Casa

Elaine King ofrece los herramientas para el bienestar financiero y las claves para un ahorro eficaz.

## Inversiones y coronavirus

En más de 20 años de carrera como planificadora financiera, a menudo me han pedido consejos sobre dónde invertir y qué comprar. Durante esta pandemia global, las cosas son diferentes, me preguntan no tanto qué comprar, sino qué hacer con las inversiones que ya tengo.

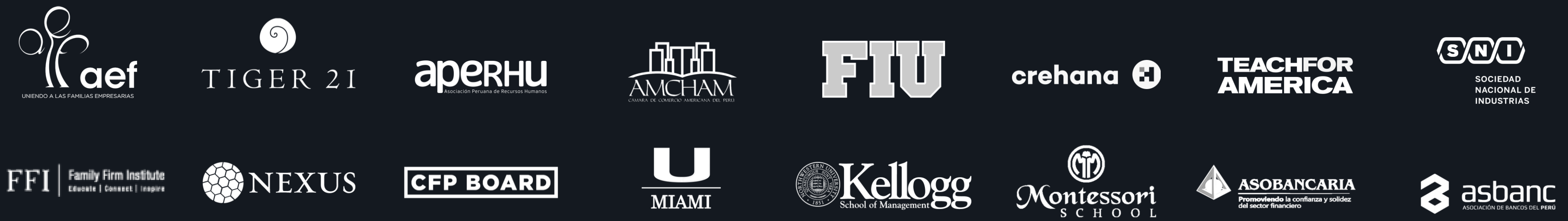


# More than 100 leading companies and businesses trust Elaine King's impact

## CLIENTS



## ORGANIZATIONS





# Proven track record impacting Latin America and the United States

## UNITED STATES



- Intuit-Financial Literacy (6,000 teachers)
- AT&T-Financial Well Being (75 parents)
- AMEX-Financial Personalities (500 team members)
- Deloitte-Executive Financial Coaching
- Family Firm Institute Family Enterprises (50 participants)
- Nexus United Nations Social Impact Investing (50 families)
- University of Miami Estate Planning Best Practices (35 executives)

## MEXICO

## CENTRAL AMERICA

## COLOMBIA

## PERU

- UDEM - Family Finances (50 families)
- Vitalis - Financial Health (350 executives)
- Entrepreneurs (12,000 students)
- Ritz Carlton-Family Business (25 families)



- Annual Financial Fair Family Finances (1,500 people, RD)
- Family Offices Family Protocols (36 members, El Salvador)
- Coutts Bank - Investments in Latin America Impact (50 Families, Panama)



- EY - Family Finances (600 employees)
- BCP - Family Finances (1,500 collaborators)
- AFP Prima - Financial Independence (650 professionals)
- Tasa - Financial Education Family Coaches (50 supervisors)
- Yanbal-Transcend Financially (600 directors)
- Pacific University/JPMorgan Couples and Finances (600 participants)
- Family Business Association Family Conflicts (1,500 families)
- KPMG-Private Enterprise Family Series



- Asobancaria Family Finances Convention (400 professionals)
- Old Mutual The Psychology of Money Conference (600 advisers)
- Javeriana University Family Systems (200 teachers)





# Motivated and Happy Clients



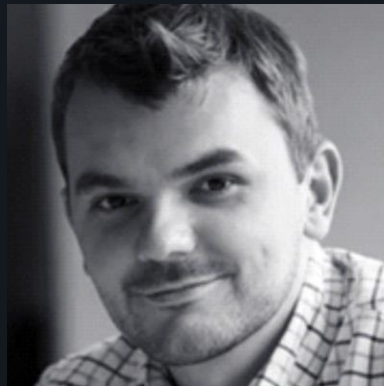
"I can't wait to start saving money and investing for the future thanks to Elaine's financial wellness workshop. Her strategies will help to build a better world."

**Francisco R. - Fortune 500 Chief Executive**



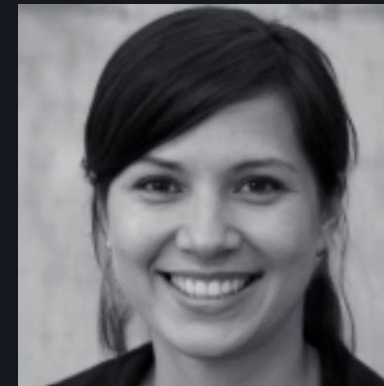
"Elaine faces challenges with elegance, integrity, and warmth. She's a professional you can trust to help you achieve your goals."

**Bárbara V. - Fashion Designer**



"I love my teacher, Elaine. She's an inspiring and knowledgeable woman who shares what she knows and wants to help people. She helped boost my self-confidence. Her support, wisdom, and professionalism is incredible. I admire her a lot!"

**Juan Diego Aguirre Gomez, Entrepreneur**



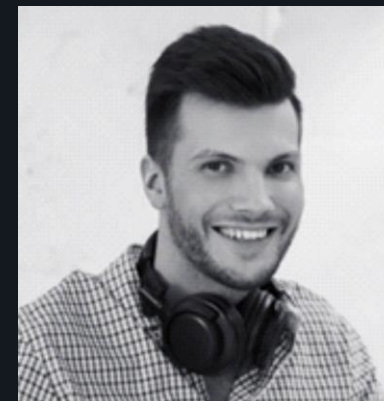
"I've always believed that I have very bad financial habits. The tips I learned here helped me corroborate this belief. What sets Elaine's workshop from the rest is her energy and inspiration."

**Andrea Jimenez, Entrepreneur**



"I'm very satisfied with all the tips and resources she taught me to improve my finances. I worked very hard on my final project, as I want my family business to evolve to the next level."

**Sara Rodriguez, Entrepreneur**



"I loved it! Elaine has a real knack for teaching and I love all the resources she shared. I'm glad I did it because, in addition to imparting knowledge, she also shared her experiences."

**Luis Beltran, Entrepreneur**





# elaine king

FAMILY AND MONEY MATTERS™



## CONTACT ELAINE TO IMPACT TOGETHER TODAY

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