

**Now is the time.
Let's transform
your future
together.**



**Family & Money
Matters™**

About Elaine King Fuentes, CFP®

Elaine is a Certified Financial Planner who, over the past 18 years, has worked with more than 1200 families to create and implement financial plans. Her holistic approach includes both the qualitative and quantitative aspects of wealth, focusing on trust-based family relationships. Elaine is also an award-winning author with executive-level expertise at leading trust companies, banking institutions and professional organizations. For details see, Linked In: [elainekingcfp](#) or [www.familyandmoneymatters.com](#).

About Family and Money Matters™

Family & Money Matters was founded by Elaine King Fuentes, CFP®, to help families understand, organize and control their finances. Services include financial planning and coaching, values-based asset allocation, and family focused workshops.

PLAN | GROW | EVOLVE

Practical creative advice
for your financial peace of mind

**Schedule a free
30-minute consultation**

Cell: (561) 212-1717
[familyandmoneymatters.com](#)
[elaine@familyandmoneymatters.com](#)
[@elainekingcfp](#)





Financial planning that reflects your personal goals and values.

Services

Holistic Financial Planning and Coaching

Financial planning is one of the most important aspects of your

life. No matter how many plans you make—about your career, marriage, vacations, home, purchase, having children, or retirement—most will not happen smoothly or at all without sound finances. But creating a financial plan can be daunting. Family & Money Matters™ is here to help make the process simple and painless. Together, we create a financial well-being roadmap that supports your life goals and serves as a roadmap to help you manage, save, invest, protect and share your money.

Values-based Asset Allocation

Asset allocation is an investment strategy that balances risk and growth based on investment goals and time frame. Diversification of assets (via stocks, bonds, cash, and so on) is a key element of that strategy. The process of determining which mix of assets to hold in your portfolio is often personal and based on what works best for you at any given point in your life. Everyone has different priorities and requirements when it comes to financial decisions. Family & Money Matters™ creates custom investment strategies tailored to your needs while ensuring that they are in line with your values.

Family and Women Focused Planning and Workshops

Your financial plan should involve the entire family whether that includes a spouse, partner, or children because their support and commitment increases the probability of success. Family & Money Matters™ specializes in helping families support each other in creating actionable plans to prioritize financial goals, cover current and future expenses, and save for long-term security.

“Elaine helped me learn to handle my finances by staying focused—it was a great relief! Her guidance, talent and warm support were great gifts for my family. ”

Patty S, family business owner, who planned for multigenerational succession

“I now look forward to saving time and investing for my future thanks to Elaine’s financial well-being workshop. The strategies will help build a better world. ”

Francisco R, Fortune 500 regional CEO, who planned for stakeholder’s financial training and sustainability

“I never thought I could have control of my finances but it was possible with Elaine’s thoughtful advice. I improved my relationship with my family. ”

Carola S, PHD senior medical research, who planned for financial career advancement

“Elaine meets all challenges with poise, integrity and warmth. She is a professional you can trust and rely on to help you accomplish your goals. ”

Barbara V, fashion designer, who planned for financial separation

Clients Include...

- » Women in transition
- » Executives planning for retirement
- » Small and family owned businesses
- » Institutions interested in empowering employees with financial know-how
- » Couples needing to get onto the same financial page

Workshop Topics

- » Women and Family Finance Management
- » Financial Planning for Couples: Don’t Be a Statistic
- » Kids, Welcome to the Real World
- » The True Value of Money
- » Top Ten Money Tips for High School Students