



## GAINS Profile

### Goals

- Help my clients to face the future and life's changes with confidence due to effective & holistic financial planning.
- Help my clients to make informed financial decisions through education.
- Coach clients to help achieve both their personal and professional goals because of being financially prepared.

### Accomplishments

- Dianne is a CERTIFIED FINANCIAL PLANNER™ practitioner.
- Accredited Investment Fiduciary (AIF®).
- Registered Financial Consultant (RFC®).
- General Securities Representative.
- California State Life and Health insurance license (License #0E14027)
- Dianne has been married for more than 18 years to Jason and has two wonderful children.

### Interests

- Read mystery books.
- Travel.
- Spend time with friends and families.

### Networks

- International Association of Registered Financial Consultants.
- BNI, San Francisco, CA.
- Referral Institute, San Francisco, CA.
- Bay Area Christian Church.

### Skills

- Ability to listen and connect with my clients.
- Ability to communicate and educate my clients at their comfort levels.
- Ability to create comprehensive financial plans for complex personal and business situations.
- Ability to help people make difficult decisions together which otherwise they cannot make on their own.
- Ability to stay focused on the goals in mind and help clients stay on track through periodic review.