

# ANNA SERGUNINA

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CFP®

## BIO:

Anna Sergunina, CFP® has over 16 years of experience as a Certified Financial Planner and is the CEO of MainStreet Financial Planning, Inc., one of the nation's largest fee-only, project-based, planning-only focused companies that serve families with young children wanting to grow their wealth and make Smart Financial Decisions along the way!

Anna is a new Mom to her two-year-old son Liam, and a Wife to her husband, Yuri of 16 years. Not only does she emphasize the challenges her clients are facing, but she uses her own personal and professional experience as a mom, wife, and business owner to help her clients live their best financial life and make smart financial decisions...so they can have their *dream career, a thriving business, a happy family, perfect health, and of course the MONEY* to do it all!

Anna is an advocate for financial education, and she has been featured in publications in Business Insider, Forbes, USA Today, Nasdaq, and WSJ. She was named "A Virtual Force" by Morningstar and recognized by Financial Advisor Magazine as one of the *Top 10 Young Advisors To Watch in 2017*. She also teaches her flagship personal finance management course, Money Flow System, and engages with her audience on her own Money Boss Podcast.

## INTERVIEW TOPICS:

- ✓ Money Boss Family Finances - Essential Steps Every Family Needs to Take
- ✓ You Don't Have to Be Rich to Create a Money Roadmap
- ✓ Money Roadmap for Busy Parents
- ✓ Funding College vs Own Retirement - Can You Do Both?
- ✓ How to Manage Finances When Starting a Family
- ✓ How to Best Fund Kids Education Needs (Private School and College)
- ✓ Should You Give Your Children an Allowance
- ✓ 3 Jars for kids: Spend, Save & Give

## SAMPLE QUESTIONS:

- ✓ How can you save for both own retirement and kid's education
- ✓ What accounts to open for your kids? (529 college savings, custodial accounts (UTMA/UGMA) and savings accounts)
- ✓ How to give your children an allowance
- ✓ How to teach your children small money lessons
- ✓ How to plan to take time off with the new baby
- ✓ Why should you Date your money?



MONEY BOSS

## Connect with Anna:

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- 🎧 [Money Boss Podcast](#)

## ARE YOU READY TO BECOME A MONEY BO\$\$\$?

