



Kathy Longo CFP[®], CAP[®], CDFP[®]

EXPERIENCED FINANCIAL ADVISOR | ENTREPRENEUR | AUTHOR | SPEAKER



Kathy Longo brings over 25 years of expertise and experience to Flourish Wealth Management. Kathy is wholly dedicated to improving the life of each client and finds joy in making complex matters simple and easy to understand. She excels at asking the right questions, uncovering new possibilities and implementing the most advantageous strategies for success. Playing such a pivotal role in her clients' lives remains an honor and a privilege. After earning a degree in Financial Planning and Counseling from Purdue University, she began her career at a small firm in Palatine, Illinois where she worked directly with clients while learning to build a viable, client-centric business. Over the years, she gained extensive knowledge and wisdom working as a wealth manager, financial planner, firm manager and business owner at notable, various sized companies in both Chicago and Minneapolis.

As a leader within her field, Kathy has garnered a vast array of honors and recognitions. Continually dedicated to professional self-improvement, she has earned several industry-leading certifications and stays relevant and innovative through both community involvement projects and her work on a variety of local and national boards. Throughout her career, she maintained a desire to start a company of her own, focused on delivering her expertise to a dedicated group of clients. Flourish Wealth Management embodies the fruition of that dream and builds off a vast foundation of insight and experience.

Kathy has also recently made her debut as an author with the book *Flourish Financially: Values, Transitions, and Big Conversations*, which encourages a holistic and personalized approach to finance, discussing the fiscal and psychological aspects of big transitions and life events. Kathy prompts readers to reflect on their unique money story and advises on how to start productive conversations about money with those closest to them in order to create a plan that is best for everyone.

In 2020, Kathy took the book a step further by using the tips, concepts, and ideas she refined in *Flourish Financially* to start her own weekly mini-podcast and Alexa Skill the *Flourish Financially Challenge*.

Kathy lives in Minneapolis with her husband, Jay Pluimer, and their three children, Madeline, Fernando and Grace.

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