

Break Into FINANCE!

Forge a New Path WITHOUT Having to Get Another
Degree!

Objectives

We'll cover the following:

Review finance career options that can be done without committing to a new degree program, and that can be achieved using as few financial and time resources as possible

Highlight options for merging your current career and leveraging your skills into a brilliant niche career in the finance sector

Uncover paths for getting into finance without having to be a financial expert

Strategize ways to achieve prominence in your selected finance field

Identify emerging and/or underrated sectors where UHNW individuals utilize the expertise of financial experts

A Little About Me

Sovereign. Mom. Financial Analyst &
Sacred System Designer. Tax
Goddess. Author. Creatrix.





Credential #1 - Tax Expert

Perfect for people that enjoy the intersection of tax policy and practice, that like to find and take advantage of (legal) loopholes, and that are interested in the politics that govern the money we earn and try to keep.

The Tax Expert Path

What You Need to Do:

- Download Publication 17 and familiarize yourself with the topics and methodology
- Review study materials on Khan Academy and ALISON (enter “tax” into the search bar for all of the lessons available on either website).
- Sign up for a PTIN (preparer tax identification number) on IRS.gov (enter PTIN in the search bar)
- Attend free webinars on CPA Academy (in the dropdown menu/filter box, select “Enrolled Agent” under Profession to ensure that it’s a course that qualifies for IRS credits)
- Complete at least 18 hours of CPAAcademy training to get added to the Annual Filing Season Program (ASFP) - need to be completed by April 15th

Credential #2 - Investment Advisor

A great fit for people that want to dive right into the deep end of money games, those that want to grow their financial confidence quickly, and that are comfortable with (or want to grow their comfort with) risk.



The Investment Advisor Path

What You Need to Do:

- Visit the North American Securities Administrator Association website (NASAA.org)
- Review Series 63, 65 and 66 exams, and select the one that most interests you.
- Click on “Contact Your Regulator) (top right of your screen) to see the requirements to be a registered advisor in your state
- Begin preparing for your test by studying courses on investment on ALISON (128 investment-related courses available; Financial Advisor Roles & Responsibilities and Introduction to Investment Banking are good places to start)
- Register for exam and pass it
- Follow up with any state mandated tasks to complete the process

Bonus Tip #1

Merge a Credential with Foreign
Language Expertise



Bonus Tip #2

What To Do When You Already Love
What You Do



Bonus Tip #3

Make Studying EASY with AI





Thank you!

I hope that the information was helpful, interesting and served you well! Thank you for sharing this time with me!