



Catherine Allen-Carlozo

CERTIFIED FINANCIAL PLANNER™

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With over 30 years of experience in the financial industry, Catherine is deeply compassionate and is driven to educate & empower people to make informed decisions in their financial lives. She is a CERTIFIED FINANCIAL PLANNER™ Practitioner trained to develop and implement comprehensive financial plans for individuals, businesses, and organizations. She has the knowledge and skills to objectively assess your current financial status, identify potential problem areas, and recommend appropriate options. Catherine aims to make a difference for her clients by looking at the overall picture rather than just their investments. She believes a financial plan is not just a snapshot but instead a moving picture that needs constant reviewing and tweaking to keep it on track.

Catherine's purpose is to help her clients thrive and enjoy greater well-being through acting as a positive and engaging advisor. One of Catherine's areas of expertise is working with women in transition: widows, divorcees, and those re-joining the workplace. More than 90% of women will be solely responsible for their finances at one point in their lives. It is her passion to change the conversation about personal finance for women from "I hope that I can..." to "I know that I will..." in order to help them experience lasting financial freedom. She strives to cultivate long-lasting relationships and bring peace of mind to every client.

Catherine is the immediate past president of South Jersey Women in Business, member of NAWBO and the Society of Financial Service Professionals.