



PROFECTUS FINANCIAL
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01/30/2019

ATTN: CalCPA Nomination Committee Members
RE: Kelly Woo, CFP® Letter of Recommendation

Dear Selection Committee Members:

I am writing to recommend Kelly Woo for the 2019 Women to Watch Award. I have known Kelly since 2010, and throughout the years that I have known her she has demonstrated natural leadership ability and traits appropriate to the situation. Kelly excels in mentoring, motivating, and training other professionals.

For the past three years, she was an active leader at NAIFA (National Association of Insurance and Financial Advisers) delivering 2-3 webinars per year on different topics ranging from financial planning, advanced pension planning to tax planning with few of her CPA colleagues as panel speakers. She has been an advocate for educating and furthering knowledge about the industry through one on one meetings with other advisers that want to grow within the industry.

Through the various channels of communication maintained with other advisers and professionals, it has developed into strategic partnerships with other financial advisors, CPAs and estate planning attorneys. Holding strong technical and operational knowledge in the financial industry, she graciously shares that knowledge with her team, and other professionals to benefit them as displayed in her many published articles, radio and television appearances. She generates synergy, respects the opinions of others, is extremely cooperative, exceptionally willing, and successful as a team player.

Additionally, she inspires confidence, respect and promotes team-building. She does that in showing appreciation for contributions and achievements, building loyalty in subordinates, associates, and increasing other professional's strengths by providing continual encouragement as well as firm accountability. She is also deeply involved in her professional associations, her church, and her children's schools and she constantly strive to not only manage, but to balance all aspects of her life well.

She ensures her commitment to the Los Angeles community as well. As an active participant in many community endeavors, including an annual "LA Food Bank" drive for the Homeless, and Meals on Wheels for the LA community at large.

It goes without saying, and I quote: "If you want to become successful, associate with successful people." Kelly radiates and inspires confidence and is a catalyst of success and deserves a recognition as a leader and 2019 Women to Watch at CalCPA association.

Rudy Paulus
Director of Marketing and Sales
Profectus Financial