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

To Whom It May Concern:

I highly recommend Kelly as a candidate for the CalCPA Women to Watch Award as she possesses many qualities as a leader, both as a professional and as an individual. I have had the privilege of initially working as her Executive Assistant beginning in 2012 and now as VP of Operations. During the past 7 years, I have witnessed her professional growth as she continued to obtain more professional licenses to further her knowledge and qualifications to provide the best for her clients. I feel incredibly blessed to have had the opportunity to be part of her journey as a thriving entrepreneur, from a small independent agent's office to multi million gross revenue financial planning and wealth management company.

Throughout the past 7 years working alongside Kelly, she has been authentic, caring, genuine, and thoughtful. She has always led by example, guiding the team with firm, but considerate instruction along the way. She constantly challenges us to improve the methods utilized as we conduct business to better serve our clients. Not only does she pursue improvement from a clientele's perspective, she motivates and challenges us in personal growth as well in hope to see us grow both professionally as well as in our personal lives.

With continual yearly growth of the company, Kelly has remained open-minded and has lent an open ear to listen to employee opinions and suggestions. Hand in hand with her open-mindedness, she has not failed to tackle topics and that need to be addressed and communicate to employees when she does notice issues in a professional matter. I am appreciative of her efforts to improve work quality and work environment in the office space. She brings the team together to strive towards excellence in teamwork.

Kelly also advocates for improvement of service quality by employing technology and other programs towards our clients' benefit. Her purpose in employing technology is to avoid unnecessary human errors to create a more transparent and trustworthy relationship with both employees and clients. The company mission is always reiterated and recommunicated safeguard that we actively contribute to overall success together. For every accomplishment reached, Kelly is the first to express heartfelt gratitude to each employee for their contributive efforts.

Kelly's leadership is not only present within our company office space, but in the overall industry as well. She serves in many roles: mentor, adviser, speaker, and successful entrepreneur. I believe her many admirable leadership qualities should be recognized and treasured by those around her. I highly commend Kelly for this Cal

Yoonah Kim
VP of Operations
Profectus Financial