



Profectus

Kelly Woo

Co-Founder & Principal



Kelly Woo is Co-Founder and Principal of Profectus Financial and Profectus Wealth Management.

She is a Certified Financial Planner® who believes in working alongside other professionals (i.e., attorneys, CPAs, risk management advisors, etc.) to reach and accomplish set goals. Her expertise is in advanced pension planning, wealth management, specifically alternative investments, and business insurance planning for protection needs.

She focuses on servicing high-net-worth clients and business owners with tax-saving strategies and individual clients with their retirement and wealth management needs. She is a firm advocate in creating a holistic portfolio, with diversified asset classes to minimize risk and maximize returns for her clients.

She is a member of the international association for financial professionals called the "Million Dollar Round Table," currently holding the highest-ranked accolade called Top of the Table MDRT (TOT) membership and was a nominated speaker for the 2019 MDRT Global Conference located in Sydney Australia. She is also a proud member of the California Society of Certified Public Accountants (CalCPA) and National Association of Insurance and Financial Advisors (NAIFA) where she consistently gives various educational presentations on different financial professionals in the industry.

AREA OF EXPERTISE

- Advanced Pension Planning
- Retirement Planning
- Charitable Planning
- Captive Insurance Planning
- Alternative Investments
Using Self-Directed IRAs
- Insurance Planning

