

ACCOMPLISHMENTS, ORGANIZATIONS AND CAUSES

Colleyville Rotary Club
Past President

Grapevine Colleyville Education Foundation
Treasurer

Colleyville Chamber of Commerce
Chair

2019 Dancing for the Stars
Colleyville Rotary

DFW Financial Planning Assoc.
Member

Certified Financial Planner
2011 Designation earned

FPA Conference for CFP Certificants
Speaker

Featured in Money Magazine

**Allen Wealth Advisors
Owner and Founder**
Fee-only advisory providing customized Financial Planning and Investment Management strategies to women, families, individuals and small businesses. We have a fiduciary obligation to our clients. Our goal is to provide the highest quality advice and service to help you meet your needs and goals.



KAY ALLEN

**CERTIFIED FINANCIAL PLANNER
OWNER AND FOUNDER OF ALLEN WEALTH ADVISORS**

“When faced with a dilemma, I love the Rotary 4 Way Test:
- Is it the truth?
- Is it fair to all concerned?
- Will it build good will and better friendships?
- Will it be beneficial to all concerned?”

HER WORDS TO LIVE BY

Kay Allen started her career in banking as a Branch Manager for a small bank in Kansas and she received her undergraduate degree in Business Finance from Kansas State University. When she moved to Texas, she transitioned to Bank Consumer Compliance auditing. As a young mother of three children, Kay did Consumer Compliance consulting work and was able to create a more flexible schedule for her young family. In 2009, she decided to pursue her love of Financial Planning. Kay then earned her CFP® in 2011 and she’s been doing Financial Planning ever since. Kay admits that she loves this career path because she loves the people she gets to work with and she learns something new every day! When asked about her greatest professional accomplishment, she says “I’ve been honored to speak at a conference of my peers but by far, my greatest accomplishment and joy is when I’m able

to help my clients achieve a financial goal—or solve a difficult problem. I recently did some pro-bono work where I was able to help a wonderful older woman avoid bankruptcy and remain in her home.” It’s exactly these types of challenges that are the source of her pride.

Kay has a passion for education and most of her current and past organization or board involvement has been associated in some way with furthering education opportunities within her community. Her goals for the future include writing a book about the economy and how it impacts the financial markets. “I know it may sound boring, but there are so many myths and misunderstandings that I’d like to tackle.”

She’s married with three adult children who all live and work in Texas. And at the end of a long day, she says there’s nothing better than changing into a t-shirt and yoga pants, sharing dinner and relaxing with my family!