

# JAMIE L. FLEMING

Financial Advisor, CFP®, Author and Public Speaker  
Owner, Fleming & Associates, LLC

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Media Kit



## JAMIE L. FLEMING

*Financial Advisor, CFP®, Author and Public Speaker  
Owner, Fleming & Associates, LLC*

Jamie L. Fleming is a CERTIFIED FINANCIAL PLANNER™, CEO and business owner, mother, author, and professional speaker. She has over 30 years of experience in the financial planning and wealth management industry, chiefly focusing her expertise to empower women entrepreneurs and professionals in their financial journeys. Jamie founded and is the CEO of her Investment Advisory firm Fleming & Associates, LLC. She is the host of *Focus on Finances*, a weekly wealth coaching mastermind for women entrepreneurs to take control of their money. She is also the creator and coach of her signature Kick the Fear Out of Your Finances™ program, which soon will turn into best-selling book. Jamie has been featured in Fox, CBS and NBC and has spoken at several events, such as *Women Building Wealth*, *IRA Mastery College Funding Workshop* and *KRC Legacy Leaders (7 figure business owners)*.

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KICK THE FEAR  
OUT OF  
YOUR FINANCES™

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# Biography



## JAMIE L. FLEMING

Financial Advisor, CFP®, Author and Public Speaker  
Owner, Fleming & Associates, LLC

With over 30 years of experience in the financial industry, Jamie L. Fleming, CFP® has helped thousands of clients achieve their ultimate financial success. She is a family woman, mother of beautiful twins, driven by a desire to help other entrepreneurs and business leaders gain confidence around money and accomplish the lifestyle and financial freedom they deserve.

Pursuing her mission, she founded Fleming & Associates, LLC in 2003. Her successful Financial Advisory firm simplifies financial strategies and services so clients know exactly how to attain financial success in their lives and on their terms. In her role as Chief Financial Officer for her clients, she develops comprehensive written financial plans and strategies with a clear and concise step-by-step process to reach desired goals and dreams.

As an experienced speaker, she empowers her audience members about their finances. Jamie has 20 years of experience teaching women entrepreneurs on the topics of money psychology, personal finance, investing, and retirement planning. She uses principles from her financial coaching program, *Kick the Fear Out of Your Finances*, to give audience members a guide to work toward their financial goals. Finally, she walks them through her 5 P's of Financial Prosperity, showing women how to think positively about their finances and take control of not only their financial future but in all areas of their lives.

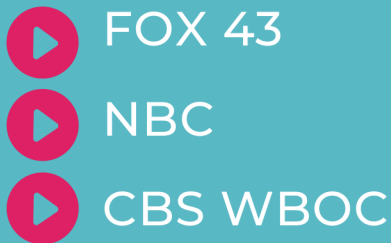
With a routine divided between mothering her twins and guiding her clients to achieve their personal financial goals, Jamie focuses her free time on volunteering at Junior Achievement, where she teaches about concepts relating to entrepreneurship, financial literacy, and global workforce readiness. In extension to her success as a finances professional, she rocks as an athlete, participating in marathons and triathlons such as Pedal for the Cure, Women's Half San Diego, San Diego Rock & Roll Marathon, Sprint Triathlons and training for Olympic and Ironman distances.

# Experience

Finances are scary. There's no shame in admitting it. Professionals and entrepreneurs alike have enough on their plates to worry about, which makes it complicated to give both business and personal finances equal attention. As a family woman and CEO, Jamie knows this feeling. That is why she pursues her mission, helping women to overcome the barriers standing between them and their lasting financial success. As a speaker, she wants her audience to know that it's OK to make mistakes and to feel overwhelmed by them. But she provides easy-to-understand tools, tips, and methods to overcome challenges standing between financial mediocrity and lasting prosperity.

Beyond her 20 years of teaching experience, she hosts a weekly financial mastermind called Focus on Finances, where she shares advice relating to business and money, helping women entrepreneurs understand everything where life intersects with money from business financial statements to uncovering the psychology behind money decisions and everything in between.

## MEDIA FEATURES



## EDUCATION



UNIVERSIDAD  
DE GRANADA



SAN DIEGO STATE  
UNIVERSITY



CERTIFIED RETIREMENT  
FINANCIAL ADVISOR™





# Speaking Topics:

## 1 8 FINANCIAL MISTAKES BUSINESS OWNERS MAKE (AND HOW TO AVOID THEM)

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Business owners have a unique set of financial considerations and challenges. And, oftentimes, there are mistakes or missteps along the way that can derail personal financial success even when the business is thriving. Jamie's talk uncovers the 8 most common mistakes business owners make and offers the tried and true solutions to avoid and overcome them.

## 2 HOW WOMEN CAN NEGOTIATE FOR MORE

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Knowing how to negotiate effectively is one of the most important skill sets anyone can master, especially women. Women have been conditioned from the earliest ages to be nice, pleasing, and not to cause a fuss. But when it comes to earning money, the last thing women should be doing is accepting less than they're worth. This talk equips women with the negotiation tools they need to confidently ask for anything they want, unapologetically, and get it!

## 3 7 STEPS TO BECOMING A MILLIONAIRE BUSINESS OWNER

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You own a successful business, but are you a millionaire? Understanding your net worth and what it means to your overall financial success is paramount to becoming (and staying) a millionaire versus living an imitation lifestyle of success.

# Speaking Topics:

## 4 KEY HABITS OF ENTREPRENEURS THAT LEAD TO LASTING FINANCIAL SUCCESS

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Do you know the winning habits truly successful entrepreneurs share? Hint: It's definitely NOT what you think. Too often, entrepreneurs equate success with revenue and completely miss out on securing their personal prosperity and eventual retirement. This talk is sure to ignite your audience's passion to embrace money-smart practices that lead to sustainable financial freedom.

## 5 6 FINANCIAL PITFALLS ALL WOMEN NEED TO AVOID

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Jamie L. Fleming is intimately familiar with the research on women and wealth - where they fall short and where they thrive. This talk empowers women audiences to understand the barriers they face, opportunities they have, and tactics to help them recognize and avoid becoming another statistic that keeps them earning less income, retiring with less wealth, and living with the fear of running out of money one day.

## 6 THE PSYCHOLOGY OF MONEY

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Jamie L. Fleming wants you to kick the fear out of your finances. But first, you need to understand why you find them so frightening to begin with. She works with audiences to figure out why they feel the way they do in regard to money and how it could be holding them back.

# Speaking Topics:

## 7 TRANSFORMING NEGATIVE MONEY BELIEFS INTO PROSPEROUS ONES

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Before you can find confidence in finances, you need to change your thinking. This starts with taking your negative beliefs about money and wealth and making them positive. It also involves retraining your subconscious mind so making better money choices becomes second nature.

## 8 FORGIVING MONEY MISTAKES

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It's easy to get overwhelmed by business, family, and life in general. All too often money matters like investing and saving get pushed to later dates. Jamie wants audiences to know that it's not too late to start making more informed choices. And she provides the exact tools necessary to start making smarter money decisions immediately.

## 9 THE FIVE Ps TO FINANCIAL PROSPERITY

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Finally, Jamie helps audiences tackle money problems by teaching them about her Five Ps to Financial Prosperity: Psychology of Money, Process Before Prosperity, Planning with a Purpose, Pitfalls to Avoid, and The Procrastination Penalty. Mastering these 5 P's sets the audience on the path to financial prosperity and lasting success.

# Speaking Experience

## EVENTS AND WORKSHOPS

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- + IRA - Mastery College Funding Workshop
- + KRC - Legacy Leaders (7 figure business owners) - 2021
- + EWI - Executive Women International - San Diego Edition - 2015
- + SDEBA - San Diego Equality Business Association - 2015, 2021
- + The San Diego Center for Social Services - 2006, 2020
- + Savvy CEO - 2014
- + Kubicle Kronicles Podcast - 2020
- + United Way - 2000
- + Visiting Nurses Association - 2000
- + Gifted Event - 2012, 2013, 2017



## FOCUS ON FINANCES

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Jamie L. Fleming created the YouTube channel Focus on Finances in 2016, where she shares tips and advices related to business and money. She covers everything from understanding business financial statements to uncovering the psychology behind money decisions. The audience has access to new and exciting content every Friday.



ACCESS HERE



# Learning Program

## KICK THE FEAR OUT OF YOUR FINANCES

Jamie spends her days motivated to create solutions that make finances less stressful for professionals and entrepreneurs. She designs and offers a clear and proven path to personal financial success. She's frequently been surprised at how little even the most successful people seem to know about financial matters. That's why Jamie created Kick the Fear Out of Your Finances in 2006. Her motivation was based on her own experience and on how a strong financial plan helped her through difficult times. She recognized financial resources for women - especially professionals and entrepreneurs, were severely lacking. "Why are all financial resources geared toward men or prepared in complex and overly technical terms?" she wondered.

And so she set out to make financial mastery easier to understand and more accessible to women through the birth of her signature coaching program now turned into a best-selling book.

## THE AUDIENCE WILL DISCOVER

- Why their own psychology around money is holding them back
- How to gain financial clarity in all areas of their lives
- How to develop their plan of action to eliminate the common feelings of shame, fear, anger, and anxiety associated with money
- The most important financial pitfalls to avoid
- How procrastination is wreaking havoc on their wallet





## Results

The framework makes it possible for women to overcome the fear of seeking out a financial plan and reject the idea that money is too complicated for them to understand. With Kick the Fear Out of Your Finances, Jamie has helped countless women through that "stuck" feeling on financial decisions and empowered them to make competent choices with confidence.

# Learning Program

## FRAMEWORK

The Kick the Fear out of Your Finances™ framework, not only gives the necessary education to empower women, but also a step by step experiential learning program to build on their knowledge by:

-  Walking through actual, real life exercises that are applicable to individual circumstances
-  Working every step of the way to identify and handle issues related to money choices
-  Organizing finances in such a way that financial questions and documentation is a breeze to handle
-  Learning how to create financial success by following and implementing personalized financial action plan

## IMPACTS AND FEEDBACKS

YESSENIA COTA,  
STAFFING COORDITATOR

This workshop is a must for everyone who has ever wanted to learn where they went wrong and how they could change their financial situation. Not only will it provide the tools necessary to create financial security but it will let you know how easy and possible it can be.”

GABRIELA SANTIS

If you think you can't do it, Jamie will show you how. I realized I can make my dreams possible and accomplish my financial goals with the excellent tools Jamie provided me with!

SUZI HARLOW,  
ACADEMIC ADVISOR

My partner and I were stuck! Our financial life needed some structure and focus. With this workshop, we are on our way to fulfilling our dreams.”



Jamie V. Fleming

CONTACT

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THANK YOU for your interest in my work as a Financial Advisor, CFP®, Author and Public Speaker. If you are looking for a professional for your upcoming speaking event or if you have any questions, I will be glad to assist you.

CONTACT ME HERE