Rady Children's

WOMEN & FINANCE

Workshop 1 | Unveiling Financial Regrets

Anna is a Partner, Wealth Advisor in our San Diego office (previously known as Dowling & Yahnke), who is passionate about helping her clients both understand and navigate the financial questions they face throughout their lives. She especially loves partnering with people to accomplish true success on their terms. Anna has over 20 years of experience in the wealth advisory field and holds elevated designations such as the CERTIFIED FINANCIAL PLANNER™ certification, Certified Private Wealth Advisor (CPWA) and Certified Exit Planning Advisor (CEPA) designations. She also holds an executive certificate in Investment Strategies and Portfolio Management from Wharton and is currently pursuing the Accredited Estate Planner designation (AEP). Anna enjoys simplifying the complex financial world, so her clients maximize their outcomes, feel empowered in their financial decisions, and feel they have a partner who has a close eye on their financial wellness. Anna is passionate about giving back and serves on the board of Stella Foundation, an organization that helps female founders. She is most proud of her role as a mom to her two children and has been married to her husband for 16 years. Anna loves being outdoors in her city, family time, reading, music (of all types!) and salsa dancing when she gets the chance.

Hope is a Partner, Wealth Advisor in our San Diego office. She joined legacy firm Dowling & Yahnke in 2017. She holds the CERTIFIED FINANCIAL PLANNER™ (CFP®) and Chartered Advisor in Philanthropy (CAP®) designations. Prior to Dowling & Yahnke, Hope spent six years as the Chief Development Officer at the Museum of Us, overseeing fundraising and marketing. She also served as the Interim Executive Director for the San Diego Civic Youth Ballet in Balboa Park and spent four years as a strategy consultant with the Boston Consulting Group. Hope holds a Master of Business Administration (MBA) from Harvard Business School where she was a Baker Scholar, graduating in the top 5% of her class. She also obtained her Master of Music in Vocal Performance and Literature from the Eastman School of Music and holds a Bachelor of Arts in Economics with Highest Distinction from the University of Virginia. Trained as an opera singer, Hope is passionate about music and the arts. She lives in La Jolla with her husband and two daughters.

Workshop 2 | Financial Wellness: Preparing for Life Transitions

Teresa Kakadelas, CFP®, CDFA™, is a seasoned financial professional with over two decades of experience. She joined the Blankinship & Foster team in 2005 and currently serves as a senior financial advisor and director of financial planning. She has become a beacon of expertise and compassion, prioritizing clients' best interests in every interaction. She established the firm's "Wise Women" financial education luncheons to help clients simplify their financial lives. Teresa is an esteemed member of the Financial Planning Association (FPA), National Association of Personal Financial Advisors (NAPFA), and North County Estate Planning Council. She also serves on the Rady Children's Hospital Estates and Trusts Council. Teresa is deeply rooted in the warmth of family life. While juggling the demands of her family, Teresa pursued a master's degree in financial and tax planning, showing her unwavering perseverance. After many years of being a "Soccer Mom," she has retired from that role and enjoys traveling, bike riding, hiking, and spending time with her family. She and her husband, Kim, live in Carlsbad, have four grown daughters, and are proud grandparents.

Monica Ma, CFA®, CFP®, CSA®, helps family steward physicians, retirees, and families make informed financial decisions to achieve their aspirations. She joined Blankinship & Foster in 2008 and is currently a member of the firm's leadership. Driven by the joy of witnessing her clients attain success, Monica ensures that every step of their financial journey is met with personalized care and guidance. In her role as senior financial advisor and chief investment officer, Monica leads the research and implementation of its investment philosophy. Monica also serves on the board of the International Community Foundation and is a member of Scripps Health Gift Planning Advisory Council. Outside of the office, Monica treasures time spent with her family, indulging in fruit-picking adventures and the simple joys of the outdoors with their beloved dogs by their side.

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Workshop 3 | When to Hire a Wealth Advisor

Kristine Wexler is the Managing Director of Bernstein's San Diego office. Kristine is responsible for overseeing the San Diego office and works closely with high-net-worth individuals, families, and non-profit organizations implementing comprehensive wealth management strategies. She often works in concert with clients' other professional advisors to address critical planning issues, such as transferring wealth, philanthropy and selling a business. Prior to joining the firm in 2020, she advised high-net-worth families at Bessemer Trust for 19 years, as client advisor and senior client advisor. Kristine holds a BS, cum laude, in biology and philosophy from Syracuse University and an MBA, cum laude, with a concentration in Economics, Finance and Entrepreneurship from the University of Chicago, Booth School of Business. Additionally, Kristine earned the Certified Trust and Financial Advisor (CTFA) certificate and is a CERTIFIED FINANCIAL PLANNERTM professional. She is a board member of Burling Bank, a Chicago based bank.

Caroline Dupont is a Wealth Advisor in the San Diego Office. Working with clients and other professional advisors, she develops, implements and monitors wealth management plans for high-net-worth families, business owners, private foundations, not-for-profit organizations and companies. Before joining Bernstein in 2020, Caroline was a professional volleyball player based in Balatonfüred, Hungary and an advisor for a multi-family office based in Park Ridge, Illinois. She earned a BS in Mathematics from Washington University in St. Louis and she is a CERTIFIED FINANCIAL PLANNER™ professional. Outside of Bernstein, Caroline is a member of the San Diego Humane Society Advocacy Committee and an avid beach volleyball player.