

## **Jesse Vu CCS, EPC**

As the principal advisor in Exceedia's Seniors and Self-Employed Family Business division, Jesse's practice focuses primarily on helping middle income families and blue-collar trades. Her solutions build financial road maps that address not only their financial wants and desires, but also identify critical financial events that can occur along the way. While many people recognize the importance of planning, the traditional financial industry has primarily focused on investment products. What makes Jesse's approach unique is her integrated process that incorporates one's personal strategies with an emphasis on behavioural finance

Jesse maintains her BC and Alberta Life as well as her Health Insurance license and divides her time between both the Calgary and Vancouver offices. She completed her Certified Financial Planner™ course work in 2018 and is currently completing the examinations.

Jesse was born in Vietnam and was sponsored to Canada as a refugee during the "boat people" crisis in 1981. Jesse holds a Bachelor of Social Work degree from the University of Calgary, as well as several post-graduate certificates from Mount Royal University in Advanced Studies in Mental Health, Forensic Studies. In 2008 she completed level I and level II Solution-focused therapy specialized training. She has always had a deep fascination with both solution focused planning as well as behavioural finance, and that methodical and analytic nature is aligned with and informs her philosophy, planning strategies and process in the financial industry.

Jesse Vu is an Elder Planning Counselor (EPC) as well as a registered financial planner (QAFP) so you can be sure that she provides expert and professional financial planning services. To earn the CFP designation, Jesse must complete an approved educational program, pass a rigorous examination and meet stringent experience requirements. Jesse also adheres to a professional Code of Ethics, is a member of Advocis, a professional association of financial advisors and planners Canada and she fulfills annual continuing education requirements to remain aware of current planning strategies and financial trends.

### Some Additional Personal Information About Jesse

Jesse and her husband, Brandon, live in Calgary with their three children. In 2021, she is taking a six-month sabbatical to Paris, France, where she will complete a book, she has been writing for over twenty years. Jesse values investing in the community through her volunteer efforts with Immigrant Services Calgary and Mount Royal University and acknowledges the importance of mentorship for the next generation of entrepreneurs. She shares her time with mentees who reach out to her both personally and professionally. Jesse's lasting interest in charity work led to her launch of the annual "Exceedia Seeds of Tomorrow Scholarship" as well as the "Jesse and Khoa Vu Scholarship" through Calgary Bridge Foundation for youth - an organization that helps immigrant youth adjust to Canada.