

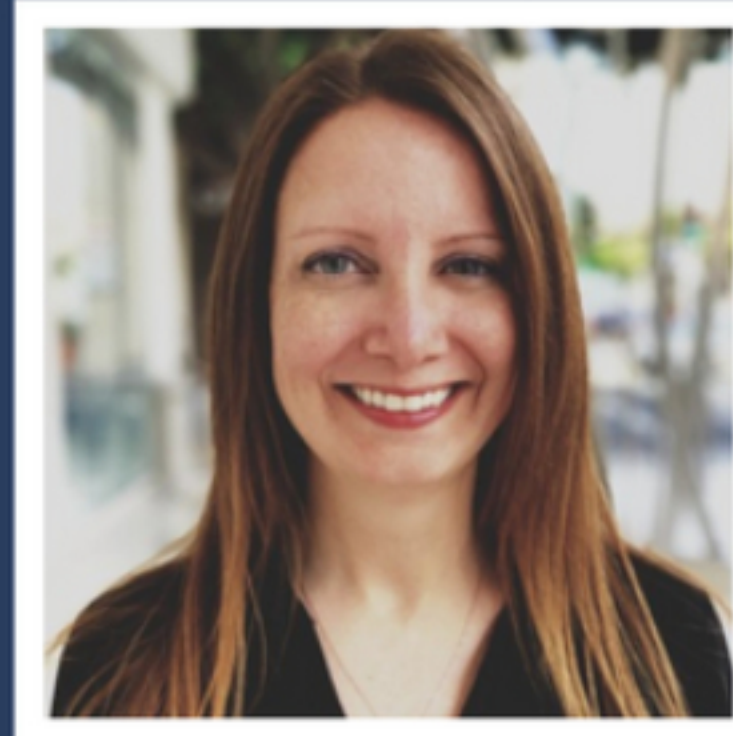
EXCEPTIONAL WOMEN AWARDEES NEWSLETTER

BY LARRAINE SEGIL

June 29, 2022

Featuring:

Kari Jean Glosser,
Partner
& Certified Financial Planner,
Abacus Wealth Partners



A partner at a wealth management firm who started with zero financial background? "Impossible!" you say. I say she exists, and her name is **Kari Jean Glosser**. Her career dreams started with visions of becoming a lawyer, but an innovative program at a financial firm took her into the field of wealth management. Today, over fourteen years later, Kari Jean (known as KJ) is a Partner and Certified Financial Planner, helping others plan for their future. She's also pursuing an Executive MBA at Northwestern's Kellogg School of Management.

In addition to all of these responsibilities, KJ holds a place as an Awardee in the Exceptional Woman Awardees Foundation (ExceptionalWomenAwardees.com). I started the EWA Foundation as a forum of high-performing and high-potential women leaders, who support and mentor each other. These truly amazing women, like KJ, share their life lessons with each other, and with this newsletter, I get to share them with you.

In a recent interview, KJ talked about two different perspectives on investing.

Values-driven investing

"As an advisor and partner at Abacus Wealth, we try to offer people investments that align with their values. It started off with just an environmental focus, sustainable portfolios, and it's really morphed into this amazing subset of people who want to take it a step further.

"Back five or ten years ago, to be an impact investor and have your values-aligned investments, you had to have millions of dollars. Today, the goal is to move the needle to the point where someone with \$10,000 can help a child somewhere in the world, help humanity, just really give back to the environment and anything else that resonates with them. It's not just about giving to charities."

Self-investment

"I always wanted to pursue a graduate degree. During the application process, my friends, family, and coworkers said 'What are you doing? You're already a partner. Do you want another job?' And I said, no, it's for me. There's nothing wrong with being a lifelong learner, whether you can use it in your job. While not for everyone, I'm finding a graduate degree is a great opportunity to expand my network, expand my possibilities. Ultimately, I realized that the best way to help my clients is to help myself by taking my education to the next level."

I love how these new ideas about investing illustrate that continuous learning is the way to offer increasingly valuable services – **grow oneself in order to benefit others.**

You can hear more of KJ's story and perspective by watching the entire [interview program on the EWA YouTube channel](#). And don't forget to tune in tomorrow June 30th at 11am PT (2pm ET) for our next program "[Women in Gaming](#)" with Christina Seelye.

Until next time,

Larraine

Founder, Chair & CEO
Exceptional Women Awardees Foundation

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