Sarah D. Asebedo, M.S., CFP®

Virginia Polytechnic Institute and State University
Department of Agricultural and Applied Economics
CFP Board Registered Financial Planning Program

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Education

Ph.D.	Kansas State University	Family Studies and Human Services *Personal Financial Planning*	2016 Expected
Graduate Certificate	Kansas State University	Family Studies and Human Services *Conflict Resolution*	2014
M.S.	Kansas State University	Family Studies and Human Services *Personal Financial Planning*	2011
B.S.	Kansas State University	Family Studies and Human Services *Major: Personal Financial Planning* *Minor: Business Administration*	2004

Teaching Experience

Virginia Polytechnic Institute and State University — Blacksburg, VA

Assistant Professor of Practice — 2014 - Current

- AAEC 3104 “Financial Planning for Professionals”
- AAEC 4104 “Retirement Planning”

Professional Experience

Perennial Wealth Group, Inc. — Blacksburg, VA

President — 2014 - Current

- Drive and implement strategic planning and service model development
- Conduct research in the field of family wealth advising, financial planning, and conflict resolution
- Integrate research, theory, and professional expertise to PWG’s service offering from other disciplines including: financial planning, psychology, mediation, therapy, and counseling
- Develop partnerships with professionals to deliver PWG’s service model, including attorneys, accountants, psychologists, therapists, and financial professionals

Family Wealth Advisor 2014 – Current

- Partner with families and family businesses in order to implement effective tools to perpetuate financial and non-financial wealth across generations
- Areas of partnership include:
    - Family governance: Creation of structure to guide and incorporate multiple family members in decisions regarding financial wealth for future generations
    - Family mission statements: Work with each nuclear family and overall family tribe to develop unique statements of purpose
    - Conflict management and resolution: Help families overcome conflict barriers to financial and non-financial wealth transfer
    - Financial wealth transfer strategies: Develop and implement strategies designed to promote financial wealth transfer according to the family's financial wealth governance structure, including inter vivos and testamentary gifts, trusts, and estate planning
    - Transgenerational entrepreneurship: Financial wealth renewal mentorship for each successive generation of the family – providing continuity and/or founding of new sources of financial wealth
    - Family business succession planning – Training and counseling the next generation of family leaders while assisting the exiting leaders into roles beneficial for multigenerational wealth prosperity
    - Younger generation mentorship - Guidance, support, and partnership with the family's next generation of leadership – promoting healthy bonds based on trust between family members
    - Comprehensive financial planning – Provide family financial planning as needed
    - Family meetings – Facilitate the joining of family members in a group setting to promote healthy discussions and relationship building surrounding family structure and decision-making.

Accredited Investors, Inc. Edina, MN

Shareholder and Team Director 2012 - 2014

- Managed the performance and career development for a team comprised of 2 Lead Wealth Managers and 3 Wealth Managers
- Conducted and facilitated team meetings designed to engage team members, improve communication, and reduce conflict inherent in working relationships
- Managed the strategic planning and research program
- Managed the training and development program for new wealth managers
- Managed the financial planning education program providing 12-25 Continuing Education (CE) credits annually

Department Manager 2010 - 2012

- Managed the performance and career development for 10 Wealth Managers
- Managed the training and development program for new wealth managers

- Managed the financial planning education program providing 12-25 Continuing Education (CE) credits annually
- Collaborated with a team to create and implement a company-wide career path development program

Lead Wealth Manager 2007 - 2014

- Managed and directed the comprehensive financial plans developed by Wealth Managers
- Managed the day-to-day client relationship and overall client experience
- Conducted and facilitated client meetings
- Communicated and discussed financial plans with clients
- Served as an expert resource company-wide in Social Security benefits and estate planning
- Managed the training and development program for new wealth managers

Wealth Manager 2004 - 2007

- Prepared, implemented, and monitored comprehensive financial plans for high net worth clients
- Initiated, designed, and implemented a training program for new wealth managers
- Collaborated with a team to develop and approve financial planning analysis templates company-wide

Refereed Journal Articles

Asebedo, S. D., Seay, M. C. (In Press). Positive psychological attributes and retirement satisfaction. *Journal of Financial Counseling and Planning.*

Asebedo, S. D., & Asebedo, G. (2013). The university for practitioners: A conceptual learning and development model. *Journal of Financial Planning, 26*(10), 50-59.

Britt, S. L., **Asebedo, S. D.**, Blue, J. (2013). Workaholism and well-being. *Financial Planning Review*, *6*(3), 35-59.

Other Publications

Asebedo, S. D., McCoy, M. A., & Archuleta, K. L. (2013). 2013 membership profile of the Financial Therapy Association: A strategic planning report. *Journal of Financial Therapy, 4*(2), 2.

Manuscripts in Preparation and/or Under Review

Seay, M. C., **Asebedo, S. D.**, Thompson, C., Stueve, C., Russi, R., (Under Review). The relationship between mortgage debt and financial satisfaction in retirement. *Journal of Financial Counseling and Planning.*

Clady, J., Leitz, L., **Asebedo, S. D.**, Seay, M. C. Topic: Subjective factors associated with long-term care insurance purchase decisions

Conference Papers and Presentations

Asebedo, S. D., Thompson, C., Stueve, C., Russi, R. Seay, M. (Forthcoming, September 2014). The relationship between mortgage debt and financial satisfaction in retirement. FPA-BE National Conference, Seattle, WA.

Asebedo, S. D., Seay, M. (2014). *To flourish: A positive psychology approach to retirement well-being.* Paper presented at the 2014 American Council on Consumer Interests Annual Conference, Milwaukee, WI.

Asebedo, S. D., McCoy, M. A., & Archuleta, K. L. (2013). *2013 membership profile of the Financial Therapy Association: A strategic planning report*. Survey results presented at the 2013 Financial Therapy Conference, Lubbock, TX.

Service

Financial Therapy Association (FTA)

Board of Directors	2013 - Current
Strategic Planning Committee Chair	2013 - Current

American Council on Consumer Interests (ACCI)

Conference Paper Reviewer	2014

Professional Associations

Financial Planning Association (FPA)	2001 - Current
Financial Therapy Association (FTA)	2013 - Current
American Council on Consumer Interests (ACCI)	2014 - Current