Lucila Williams
Founder of The Intentional Advisor

Lucila Williams, CFP®

THE INTENTIONAL ADVISOR
9175 E Kenyon Ave, Suite 100
Denver, CO 80237
(303) 756-2062

Lucila@TheIntentionalAdvisor.com
www.TheIntentionalAdvisor.com

ABOUT

Lucila Williams, CFP® is a financial advisor, firm founder and practice management thought leader for the next generation of financial advisors.

She is the founder of The Intentional Advisor, a nationwide practice management consulting firm dedicated to helping financial advisors build process-driven and profitable Advice-Based Financial Planning firms that align with their values.

Lucila shares her message with financial advisors throughout the country through in-person and virtual speaking engagements, online courses, group coaching and one-on-one consulting.

She is also the founder and President of LOTUS Financial Partners, an Advice-Based Financial Planning firm in Denver, Colorado. As of 2023, LOTUS has grown to include a team of six independent financial advisors and three support staff.

In her advising work with clients, she specializes in working with women and couples nearing retirement.

Outside of work, she is passionate about her family, cappuccinos and chihuahuas!

EDUCATION

- Bachelor of Science in Business Management
- Certified Financial Planner (CFP®) Designation
- Chartered Financial Consultant (ChFC®) Designation
- FINRA Series 6, 63, 65 Securities Registrations
- State Life, Health and Long-Term Care Insurance Licenses

ADVICE-BASED FINANCIAL PLANNING...

is a comprehensive financial planning relationship that is not contingent up on the sale of any product and supports full implementation of the plan.

ADVICE first, **IMPLEMENTATION** as needed.

DESIGN your process-driven Advice-Based Financial Planning practice.

ATTRACT the right clients and get hired for advice in one meeting.

IMPLEMENT to build a profitable practice that aligns with your values.

The Intentional Advisor

SPEAKING

The best keynotes, workshops and virtual trainings aren't canned presentations, they are intentionally designed to serve the needs of your audience. **Tell me what your advisors are struggling with and I will custom tailor a training to meet the challenge.**

MOST POPULAR PRESENTATIONS

Delivering Advice

Design a process-driven Advice-Based Financial Planning practice.

- **Process-Driven Practice**- Turn problems into processes that make your team stronger and more effective over time.
- **Planning Fee Philosophy**- Develop a planning fee philosophy that makes sense to your ideal client and your bottom-line.
- **Mass Affluent Planning**- Expand your reach and build a profitable business serving the not-rich-yet.

Marketing and Selling

Attract the right clients and get hired for advice in one meeting.

- **Cultivating Key Partners**- Implement a proven process to cultivate truly productive partnerships with other professionals.
- **High-Value Offer**- Hone your High-Value Offer to get hired for advice in one meeting by the right clients.
- **NextGen Connection**- Build your business and preserve assets by cultivating NextGen connections.

Business Owner Mindset

Build a profitable practice that aligns with your values.

- **Core Business Values**- Use your core business values to make more aligned business decisions.
- **Making Your Team Work**- Run a process-driven business to more effectively lead your team and free up your time.
- **Independent Together**- Create a path for NextGen Advisors to bring value to a well established practice

KEYNOTE **WORKSHOP** **VIRTUAL**