

GLOBAL
Wealth Management



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GLOBAL WEALTH MANAGEMENT

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With Covid now what is your biggest challenge to balance your profession and family?

As a Wealth Advisor with three girls under the age of 10 at home, I would have to say the biggest challenge is keeping my balance as I handle all the changes and uncertainties. I think it is safe to say most of us have been through an emotional roller coaster at some point during this time. Right now, I am balancing the emotions that come with a turbulent market and the effect it has on my clients and the impact the pandemic has had directly on my family. It does affect me to know my children cannot go to school, see their friends, and participate in their extracurricular activities. It also affects me to hear about dear friends and family members losing their jobs, or even worse, loved ones. Then trying to process my own feelings and stay strong to balance it all. I found exercise to be my best stress management tool to keep me balanced throughout my week.

What advice would you give younger women?

Growing up in Vermont with just my mother and two brothers, from an early age I realized the hardships single mothers face. Not only was my mother raising the family, but she also helped care for her aging parents. I made a commitment when I started in the industry to help women, whether they are married, single, widowed or divorced, to make sure they have confidence and clarity in their financial future. My biggest advice is no matter what you're faced with, don't wait until it's too late to ask for help. You don't have to be a millionaire to need professional financial advice.

What are you doing to stay relevant during these challenging times?

Most people stay relevant during these times by adapting and working with the latest technology. Although technology certainly helps to stay relevant it is a little more challenging for me as a retirement planner working with senior citizens who may not be as tech savvy as clients in other industries. Two of the most successful things we have done to stay relevant is to expand our service offerings. One example is we recently re-launched a division called Global Wealth Women, where we do educational and social events for women. I also believe that delivering our messages in a variety of modes i.e. webinar, social media, tv, and radio for example has given individuals many ways to tune in to educate themselves.

What are you passionate about?

I am passionate about educating people, specifically women. As a woman, I understand what it means to work hard, and put others needs before my own. Being a wife, and a mother of three children, I also understand the challenges that women face today. I have personally dealt with adversity in my life and, thankfully, came out stronger in the end. I have now made it my mission to help guide women to and through retirement, as what I'd like to call their financial advocate. I truly hope that someday I can look back and see the impact that I have made on the community because of my passion.