

Julia Chung, CFP, CLU, FEA

Senior Financial Planner, Entrepreneur at Spring Financial Planning & Admin Slayer Services
South Surrey, BC, CA

Personal Finance & Family Enterprise professional leading Spring Financial Planning & Admin Slayer Services

Biography

Julia Chung is a highly educated, experienced financial professional specializing in personal and corporate finance, multi-generational family wealth, legacy, and succession planning. Her passion and drive to help people achieve is evidenced in her business, volunteer, and educational life. Julia is co-founder & Sr. Financial Planner at Spring Financial Plans, an independent financial planning firm, and co-founder & CEO at Admin Slayer. She is also an Advisory Board Member for Entrepreneur Mom Now, an online network, education and support system for business mothers like herself. Julia has created several other companies in the past, including JYC Financial, Facet Wealth Strategies, Vida Coffee, & Las Rebels Entertainment. Julia co-authored the ebooks "Women & Money" and "The Art of Delegation", is Business Editor for Gazette and PowHerHouse magazines, and writes for several publications on business and finance. She actively volunteers with Junior Achievement BC, a financial literacy program for children, and with the Institute of Family Enterprise Advisors on the events committee. Julia's lifelong dedication to education has provided her with multiple designations and a thirst for knowledge that has extended beyond any single narrow area of expertise, allowing her to analyse and understand situations from multiple perspectives. Julia's unique ability is "Manifesting the Improbable." She relishes challenge, and is especially excited by opportunities that start with someone saying, "You can't do that."

Industry Expertise

Financial Services, Business Services, Women, Corporate Leadership, Talent Management, Writing and Editing

Areas of Expertise

Personal Finance, Financial Planning, Entrepreneur, Family Business Planning, Estate Planning, Cross Border Planning, Women in Business, Women & Leadership, Productivity, Small Business, Finance, Tax Planning

Affiliations

Money Sense Approved Advisor (www.moneysense.ca)

Event Appearances

Speaker
PowHerTalks

Emcee
PowHerTalks

Speaker
PowHerTalks

Education

CPA British Columbia
CFO Operational Skills Corporate Finance

UBC Sauder School of Business
Family Enterprise Advisor Designation (FEA) Family Enterprise

The Institute for Advanced Financial Education
Chartered Life Underwriter Designation (CLU) Estate Planning

Financial Planning Standards Council
Certified Financial Planner Designation (CFP) Financial Planning

Accomplishments

Wealth Professional: Finalist - Award for Engagement, Loyalty & Client Care

To succeed in today's marketplace client engagement, loyalty & client care are critical. This Award has emerged from the need for Advisor and offices to excel in these crucial areas. The Award of excellence dedicated to outstanding engagement & loyalty programs plus first class client care service by an advisor or individual office. Client service is an important measure of any office's long-term success.

Hot List 2016: One of the 50 Leading Figures in Canadian Wealth Management

The 50 men and women who made the cut this year exert considerable influence on the financial planning industry. That includes advisors and executives, of course, but also regulators, educators and government ministers, past and present. The industry is changing rapidly; those who can adapt best to new regulatory pressures and harness the constant upgrades in technology will be the ones who shape the future of wealth management.

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Wealth Professional: Finalist - "Young Gun of the Year"

Award of excellence for the outstanding young advisor. This accolade goes to an industry player under 40 who has best excelled at pushing the envelope with innovation and growth, garnering industry attention, the the respect of peers.

Top 40 Under 40: Nominee

Award for entrepreneurs, executives & professionals under age 40 who have demonstrated excellence in business, judgement, leadership, and community contribution.

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