

Colleen Bowler, CFP

Co-Founder, C&J Innovations, LLC

SPEAKER INFORMATION

PERSONAL PROFILE

After building her own advisory practice to half a billion in assets under management (all as a single mom) Colleen Bowler, CFP® successfully sold her practice and founded C&J Innovations, LLC.

Her expertise lies in helping financial advisors enhance and grow their practices, integrating mindset-driven strategies, which expand trust and deepen client relationships.

Colleen's dynamic speaking style combines actionable insights with real-world expertise, inspiring financial professionals to elevate their approach. Treating each speaking engagement like a conversation with the audience, she equips advisors with strategies they can apply in their practices to deliver meaningful, client-centered results that stand out.



SPEAKING TOPICS

The Human Side, (em)Powered by Technology™

- Learn 3 simple ways to use technology to strengthen — not replace — human connections.
- Discover the “Passport Program” approach to keep your business high-tech and high-touch.

Amplify the Quieter Voice! How to Sign and Retain HNW Women and Their Families

- Understand the unique concerns and decision-making patterns of high-net-worth women.
- Discover strategies to build trust and confidence with women who may feel unheard in financial conversations.

3 Steps to Establish TRUST in 5 Minutes

- Master a simple, repeatable process to create immediate confidence in client meetings.
- Learn how to shift from “financial advisor” to “trusted partner” in your very first interaction.