

Colleen Bowler, CFP

Co-Founder, C&J Innovations, LLC

SPEAKER INFORMATION

PERSONAL PROFILE

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

Her expertise lies in helping financial advisors grow revenue, increase referrals, and retain the clients they've worked so hard to earn. Drawing on proven strategies she used to build her own practice, she helps advisors integrate mindset-driven frameworks that expand trust and humanize every financial conversation

Colleen's dynamic speaking style combines actionable insights with 25+ years of real-world expertise, inspiring financial professionals to elevate their practice. Treating each speaking engagement like a conversation, advisors leave with strategies they can apply immediately, creating meaningful, client-centered impact that lasts for generations.



SPEAKING TOPICS

The Human Side, “em”Powered by Tech™

- *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 Those they Love

- *Understand the unique concerns of high-net-worth women.*
- *Discover strategies to enhance trust and confidence with women who may feel unheard in financial conversations, creating partnerships where they feel empowered to take action.*

Let your Prospects Experience what your Clients Already Feel

- *Master a simple, repeatable process to create immediate value with prospects.*
- *Learn how to shift from “financial advisor” to “trusted partner” in your very first interaction.*