



Colleen O'Donnell

Colleen O'Donnell is an advocate for balance, generosity, and fun.

Colleen's enthusiasm for life, her family, her businesses, and Strategic Coach® is inescapable.

Over the past 20 years, Colleen O'Donnell, a Certified Financial Planner (CFP), has created her financial planning firm, Strategic Wealth Partners, and grown it into a top firm in Texas while raising a son as a single mom, co-authoring a book, and making time for her extended family, friends, and a variety of non-profits.

"I think I bring a good blend of business and family to the front of the room," Colleen says of her coaching style. "I had to figure out a different way to do things — and Strategic Coach helped me do that." She is in good company. "As a coach, I hear a lot of stories like 'I didn't have a relationship with my family, and now I do' and about the difference people are making in their businesses and communities. It's amazing to see this group of people go out and change the world in their own ways." This, Colleen says, is why she's a coach.

Colleen started to develop her entrepreneurial skills at an early age when she and her siblings went door-to-door selling scarves their mother had made. Moving to Dallas in her early twenties, she struck out on her own, accepting a job only to discover she'd be required to relocate. It was Christmas-time, she was in the middle of a divorce, and her son was ill — this was no time to think about moving!



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This low point proved to be the beginning of her current success: "Somebody said to me, 'You're good at math. Why don't you do this thing called financial planning?' So it wasn't anything grand — it was a move of desperation!" With that, she went into financial planning and discovered she had a gift.

Today, she's a recurring recipient of *D Magazine's* Best Financial Planners in Dallas, and *Texas Monthly* listed her as one of 2010's Five-Star Wealth Managers. She's also a member of several leading industry bodies, including the Estate Planning Council of North Texas, The Financial Planning Association, and the prestigious Resource Group.

Colleen's accomplishments are a result of her belief that to be successful we must be "whole people." ... "We can't keep all the balls in the air in our family life if our work world is not right and vice versa."

She creates comprehensive financial and estate plans for financial planning clients that give them the confidence and clarity to focus on the goals that are most important to them. Whether it is helping arrange the logistics of caring for ailing grandchildren, constructing viable retirement plans for mid-career professionals, building savings and insurance programs for multi-generational families, or helping create a living legacy, Colleen looks at the big picture. By building a team of in-house staff members and professional associates in the legal, insurance, and securities industries, she pulls together the expertise to create comprehensive, customized plans for her clients.

Colleen's accomplishments are a result of her belief that to be successful we must be "whole people." The Strategic Coach principles were immediately appealing to Colleen and completely consistent with her approach to business and life in general. "We can't keep all the balls in the air in our family life if our work world is not right and vice versa." Her clients frequently comment about Colleen's conviction that we have to have balance in our business and family lives if we are to be successful in either.

Colleen has been involved with Strategic Coach for over ten years and thrives on the discussions that take place in her sessions. The collective wisdom and creativity in a Coach workshop is what brings the Coach principles to life. She appreciates what it takes for entrepreneurs to show up for their workshops each quarter. "Their willingness to grow, their concern for their family, their organizations, their clients — it's inspiring." Participants in the Program, she says, not only get leadership and direction from their workshops, but give it back as well: "Coach clients are challenging, bright, and interesting, and they're willing to give each other ideas and resources."

Leading Coach workshops, Colleen says that she always comes away with a fresh perspective. The discipline of quarterly meetings and planning, combined with the Coach concepts and tools, and the interaction of the group of entrepreneurs, lead to discussions that form new ideas and perspectives.

Now Colleen has expanded her team so she's free to focus on her clients, her family, and new projects — like *Generous Kids*, a book and a program to help young people develop the habit of giving, just like we've taught them the habit of putting on their seat belt. Adopting the habit of giving, they find the joy that comes from freely sharing the abundance and talents they've been given. The program has inspired young people to create several high-profile projects and has been incorporated into the curriculum at several schools. Colleen would love to see the habit of giving spread throughout everyone's lives.

With expanding opportunities to make a difference through her business, her coaching, *Generous Kids*, and a wonderful family, Colleen loves her life. "It's just so exciting," she says. "I love empowering people to be who they truly are, and Strategic Coach is a way to make that happen."

For information about Colleen O'Donnell's upcoming workshops, see: <http://www.strategiccoach.com/workshops/upcoming>