



# CENTERED WEALTH

## PLANNING, INVESTING AND GIVING WITH CONSCIOUS PURPOSE

Centered Wealth® is an approach to building wealth which actively values the well-being of the body, heart, mind, spirit, community and world.

### OUR STORY:

In 2010, after more than a decade of practicing wealth management independently, Jina Penn-Tracy and Stuart Valentine met and began collaborating. In 2017, they co-founded Centered Wealth, an investment and financial planning firm focused exclusively on sustainable, responsible and impact investing. Our goal is to create measurable positive progress in the world on behalf of our clients and to enhance the experience of Centered Wealth that comes from connecting one's life purpose with one's financial choices and investment portfolio. We serve clients nationwide and U.S. citizens living abroad in most countries. Introductory meetings are complimentary.



(Annya Gage, Jina Penn-Tracy, Stuart Valentine, Annalisa Clifford Gold)

### OUR FIDUCIARY SERVICES:

- Values-based wealth management & planning
- Serving individuals, families, small businesses, trusts and foundations
- Estate planning & intergenerational wealth transfer
- Tax strategies (domestic & international)
- Sustainable, Responsible and Impact Investing (SRI)
- Philanthropy, giving strategies and wealth redistribution
- Extended family engagement & financial coaching
- Shareholder activism
- Mission-aligned investing
- Holistic & dynamic client service
- Integrated strategizing with other professionals (CPA, attorney, etc.)
- Direct impact investments, 1031 exchanges, opportunity zones and private placements (as appropriate)
- Life-enhancing financial empowerment and resiliency building
- Emotionally sensitive & trauma informed practices
- Proud to serve clients with diverse and/or non-normative backgrounds, interests, and life experiences
- Over 45 years of combined experience in SRI-focused wealth management

Jina and Stuart are available for local, national and international speaking engagements.

[www.centered-wealth.com](http://www.centered-wealth.com)

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