



Colin B. Exelby, CFP®

Founder, Celestial Wealth Management

“I have found that the more successful business owners become, the more their personal finances take a back seat toward managing the business. It becomes really hard to keep juggling all your roles and properly manage your personal financial situation. That is where an experienced financial advisor can add value.”

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Introduction Bio:



I have an educational background in Finance and Economics with Bachelor's degree from Salisbury University on the eastern shore of Maryland.

I am a numbers geek and love quantitative analysis. What I should have done was get a degree in Psychology because that is probably over 75% of what my time is now spent on. In fact an entire sub industry has been created called behavioral finance.

Money and wealth is highly emotional. So helping people manage their emotions when dealing with money is important. I worked for a large investment bank for nine years before starting Celestial Wealth Management as an independent financial advisory practice in 2009.

We aim to take the complex financial lives of business owners and their families and simplify them. We help optimize their cash flow, grow and strive to preserve their net worth and create a legacy for their families.

Interview Topic Suggestions:

- ✓ Difference between Certified Financial Planner™ Professional and Financial Advisor
- ✓ What is your background?
- ✓ When should someone be looking to hire a Certified Financial Planner™ Professional?
- ✓ What are your top five financial tips?
- ✓ What are the top five financial mistakes?

Common Interview Questions:

- ✓ What is a Financial Advisor/Certified Financial Planner™?
- ✓ What makes a good Certified Financial Planner™ & what to look for?
- ✓ When should a business owner look into hiring a Certified Financial Planner™?
- ✓ How to find one?
- ✓ Why should you have a Financial Advisor?