

Rachael DeLeon ([00:02](#)):

Welcome to Real Money, Real Experts, a podcast where leading financial counseling and coaching experts share their stories, their challenges, and their advice for helping people manage money in the real world. I'm your host, Rachel De Leon, executive Director of the Association for Financial Counseling and Planning Education for A-F-C-P-E.

Dr. Mary Bell Carlson ([00:24](#)):

And I'm your co-host, Dr. Mary Bell Carlson, an accredited financial counselor, or AFC and the President of Financial Behavior Keynote Group. Every episode we're taking a deep dive in the topics that personal finance professionals care about, helping clients, building community, and your professional growth.

Rachael DeLeon ([00:44](#)):

The opinions of our podcast guests are their own, which means that their stories, views, or lived experiences may differ from yours or mine. However, the one thing you will always find on this show is a common thread. Our guests are passionate about helping people with their money to improve their lives, and they believe in upholding high standards for the clients and the communities that they serve. We encourage you to tune in to real money, real experts with open curiosity. Why? Because it's oftentimes in the conversations where viewpoints or stories differ from our own that we learn the most. Our guest today is Jessica Medina. Jessica is an avid fan of financial independence and a self-described karaoke enthusiast. She regularly attends a full length karaoke version of the musical Hamilton Lovingly called Hamiltons. Jessica is also a former lawyer and an accredited financial counselor, and I've had the tremendous opportunity to get to know her a little more through our work on our communications task force. And I'm very excited to get to interview her today on the show.

Dr. Mary Bell Carlson ([01:53](#)):

So Jessica, before we jump into your journey, I want to hear about this karaoke enthusiast. Tell us more.

Jessica Medina ([02:00](#)):

Oh, thank you so much for asking Mary. I appreciate having this platform to share my love of all things karaoke. So my husband and I are friends, started a what we call Hamilton's, and it is, as Rachel described, a full length karaoke version of the Hamilton Musical. And as you can imagine, this is a very popular musical. It is near and dear to so many people. And so when we were in DC before the pandemic started, we were able to get this up and running. They have run the show over 25 times in the Washington DC area. It is attended by upwards of a hundred people. Every time we have people who come in costumes, we have people who are very close to some of the characters. And the beauty of this is it's to sing along. So it's not like you're just going to see other people perform Hamilton, you get to sing the entire time as well. It's one of those communal, cathartic, just uplifting experiences. And now that you know, live events are back in action and we're all getting back together, they've started it up again. And if anyone is listening to this podcast, they will be doing two more in 2024, July 20th and December 13th. So come on out to Washington DC for an amazing experience and join us for Hamiltons.

Dr. Mary Bell Carlson ([03:15](#)):

I love it. Now do we get a little preview from you today,

Jessica Medina ([03:19](#)):

<laugh>? Oh no, it's

All ([03:20](#)):

Not that kind of podcast. <laugh>,

Jessica Medina ([03:24](#)):

You gotta come to the show.

Dr. Mary Bell Carlson ([03:26](#)):

Alright, we'll stay anticipated.

Rachael DeLeon ([03:27](#)):

Jessica, on your website you say, first came law and then came passion. Tell us a little bit about your journey from lawyer to financial coach.

Jessica Medina ([03:37](#)):

So, I'm so glad we had the intro. We did. When I was in high school, I thought I wanted to go into musical theater. Shocker, I know <laugh>. And instead I picked the law because

All ([03:48](#)):

<laugh>, that seems like a, and it just natural

Jessica Medina ([03:51](#)):

Progression, natural transition. Yes. It just seemed like I was pretty smart kid in high school. I always got good grades. I was one of those overachievers. And I decided that the law would be an arena where I would be intellectually challenged. And because I had only seen lawyers on tv, I'd get to perform all the time, right? I would just be in court kind of doing a performance. And so I went to college knowing that I wanted to be a lawyer. But when I actually started practicing, I realized it was nothing like what I had imagined practicing law might be like. It was a lot of reading and writing and sitting alone in my office reviewing documents. And although I enjoyed the intellectual rigor of, you know, going to law school and working at a large firm in Washington DC I didn't actually love the work itself. I had always wanted to work for the government. I have a very strong public service, you know, strain that runs through me. And that wasn't my path. I went to a private firm after law school and we can get a little more into how I ended up there. But even when I eventually ended up working at the Securities and Exchange Commission, although I enjoyed the mission and I loved my colleagues, I still didn't enjoy the work. And I realized I think I had just fallen out of love with the law. It wasn't for me anymore. And of course then I proceeded to have an existential crisis because what am I, if not a lawyer? And I found, you know, the accredited financial counselor program, it really spoke to me in terms of how I wanted to help people and be collaborative and really solve problems. And it was right in my wheelhouse of wanting to help people with personal finance issues that did not have to do with investments because that's what I had been investigating for the past few years and I hated it. So it all came around, you know, really full circle in terms of I do end up helping people all day long, but I get to do it in an arena where I don't have to practice law.

Dr. Mary Bell Carlson ([05:47](#)):

Wow, that's quite an incredible journey and for some would say a big jump, but I actually think there's a lot in our field that come from various backgrounds. And so I love the fact that you were able to say, Hey, this is truly what I love, rather than this is what I got my degree in, or this is what I feel like I have to do.

Jessica Medina ([06:05](#)):

I think that's right. You know, I was a counselor at law and now I'm an accredited financial counselor. There are so many transferable skills that I brought over from my legal training. I also happen to work with lawyers, so that helps

Dr. Mary Bell Carlson (06:16):

<laugh> <laugh>. Well let's dig in a little more 'cause we do wanna learn more about your private practice. We have several listeners that are actually interested in starting one. So will you kind of talk to us a bit about what that transition, well, what the business looks like from a accredited financial counselor point of view

Jessica Medina (06:34):

Now? I mean, it's taken me a couple of years to really find my footing and I just wanna give that caveat to anybody who is beginning their private practice. It's okay if you don't know exactly who you wanna work with or exactly what types of problems you want to solve. You will learn that quickly by working with real people. Oh, believe me, <laugh>, you will learn what you like. You will learn what you don't. So it was a bit of a journey for me to get to where I am now. But my business as it stands, as an accredited financial counselor, it's almost easier for me to explain to my future clients what I don't do, rather than what I do do. I don't help people with investments. I don't do tax planning, I don't do estate planning, I don't sell insurance products, I don't sell any financial products at all. I'm there to help my attorney clients with the foundational money management skills that maybe they didn't get at home or they didn't get at school and they are assumed to already have now as a working professional, I'm there to fill in the gaps, make sure that they understand how their money is working for them, maybe how their money is not working for them in terms of the cash management and money going in and money going out. I'm also there to help them pay down debt in a strategic way that also aligns with whatever emotions they may have around their debt. And my business in particular focuses on attorneys in transition. So I'm there to help my attorney clients figure out can they afford to make a career transition? Can they afford to take a job that they really love that maybe doesn't pay what they're making now? Can they afford to grow their family, move to another location, you know, pursue an entirely different career. I really specialize in the transition space because I feel like it's so stressful, especially for my attorney clients who are overthinkers over analyzers, extremely risk averse and just terrified of money. And so that's kind of where I've positioned myself in the market. And if you know any lawyers, you probably know a lot of unhappy lawyers and many of them would like to make a change.

Dr. Mary Bell Carlson (08:34):

Wow. Yes. That's so true. I wanted to get a bit more, I love that you have such a clear niche as you were talking, it's very clear who you work with and I think a lot of us struggle with that because we say, oh, we do business for anyone. We kind of wanna have a blue ocean. Right. What do you think the advantage of you having such a unique niche and being very specific about that niche, what sets you apart and why is that important for entrepreneurs? So

Jessica Medina (09:02):

I think as entrepreneurs and especially when you're in the service industry, my experience has been that most AFCs, they want to help everyone because they know that everyone needs help. And we have such a broad base of knowledge, we really can help people with all different types of personal finance issues. That's the point, right? When you go through the curriculum, the exam covers a whole bunch of things. Our continuing education requirements cover a vast array of topics. I could help people with anything, but the fact that I've been able to focus my business and therefore focus my skillset makes everything that I do in my business much more focused. I have very specific referral partners that I seek out in terms of people who maybe work with my clients or would be helpful to my clients. I have very specific speaking

engagements that I go after because they're in front of particular communities that are of interest to me. I also know what to talk about when I'm marketing my business. I don't talk about people who might be approaching bankruptcy. That's not my clientele. And so I feel like I don't have to know bankruptcy that well. I will say I have had lawyers come to me who have been in that position and because of my a FC training, I have been able to help them find the best resource, but it's not me. And so what I find is that it really helps me focus in my attention, my energy, and my effort across all of the different aspects of my business to be really, really pinned on my attorney clients and the kind of attorneys that I work with, right? Because if you think about who I'm trying to help, not every attorney is a great fit for me. I'm not a great person to work with. If you wanna make partner in your firm <laugh> and just do that for the rest of your life, that doesn't seem like you might need help from an accredited financial counselor. <laugh>. Maybe you would. But, um, and I have a few, I have a few partner clients 'cause they're making other transitions in their life that are terrifying for them. But it really does, you know, create a, a short list of activities and content and effort that you know is important for me and for my business.

Dr. Mary Bell Carlson ([11:07](#)):

Wow, that's so clear on your goals and your outcomes and what you're wanting to achieve. And I think it also helps clarify your revenue lines as well. I think often we're like, we just need to have a business and make some money. But really when you're clear about who you serve and how you serve them, it makes the business side much more efficient along the way and sustainable, I would argue. Now Jessica, you mentioned one more thing that I wanna dig into. You mentioned referral partners and how you market about speaking and other things. How do you market to your niche?

Jessica Medina ([11:41](#)):

When I'm thinking about who I serve, right? If I'm working with attorneys who are potentially in transition, some of my best referral partners are actually career coaches, right? So these are the people who are helping and they're lawyer career coaches. There's an entire cottage industry of former lawyers who are helping lawyers no longer be lawyers. It's kind of a joke in the <laugh> in the legal world, but there's so many lawyers who no longer want to practice law. We needed to start an entire industry to support them. And I'm part of that. And so I have found, you know, as opposed to maybe what you might think as an accredited financial counselor, my best referral partners would be like financial advisors, accountants, estate planners. I find that my best referral partners are the people who are helping folks think about making a transition. Because I come in and help with the financial piece, which as I'm sure the two of you are hopeful, nobody should be helping them with the money if they're not trained to do it. And so a lot of my career coach referral partners are so happy that I'm in their world and can help their clients think through the money piece because that's just not their wheelhouse and they don't wanna be giving any financial advice as they shouldn't. And so I can come in and really provide that support without having to help the person find the next job. That's a different coach. So that's one of my key referral partners. And those career coaches also tend to run group programs or provi. They have their own podcasts, they have their own audiences. And I find that being able to collaborate with them and share content and do, you know, joint webinars, do collaborative projects together, that's a really great way for me to showcase my expertise to the people who are specifically looking to work with someone like me. I

Rachael DeLeon ([13:26](#)):

Love, I love the touch on collaboration as well. And I'm curious for someone who, whether they have a private practice or they're just getting started, I think sometimes people don't know where to start in terms of building those referrals. So I'm curious how you approach different professionals in those cross-functional fields. You know, do you go in with a collaborative approach and do you have any tips for people who are starting to build those referrals?

Jessica Medina ([13:52](#)):

Absolutely. I think with, whenever you're trying to build a relationship with anyone, I always go in with how can I help you? Number one, that puts me in the right energy. I al you know, as I've mentioned a couple of times, I am a service oriented person. I end up attracting service oriented people as well. But I always go into any conversation with how can I be helpful to you? And so when I started reaching out to referral partners, I love LinkedIn for this. I use LinkedIn for most facets of my business in terms of marketing and business development. But it has been phenomenal for finding referral partners because LinkedIn is all about businesses, talking to businesses, right? Everybody on there is doing something is, you know, trying to get their name out there. They're trying to, you know, further themselves in their career or further their own business. And so people are very open to those types of, those types of communications, those types of reach outs. And I don't know if it was just me or maybe I'm just, I'm wonderful at writing reach out emails to referral partners. But when I tell a financial advisor that I work with attorneys at law firms, would they like, you know, and I think that they could be a great fit for some of my clients. I would love to hop on a call. Can you imagine? I have about a hundred percent close rate on that, right? And, but I'm leading with, I have people who need your services. I would love to hear more about what you do. I do not lead with, I help these kinds of people. Do you have any of them in your network that I could then work with? It's always about what I can do for them. And if they're a good referral partner, they will naturally reciprocate. And if they don't, well that's a sign for me as well.

Dr. Mary Bell Carlson ([15:33](#)):

So you've been running your own business now for over seven years. Tell us a bit more maybe the one thing that has been the biggest learning experience from you owning your own business. Oh

Jessica Medina ([15:43](#)):

Gosh, that is such a great question. I think the biggest learning experience for me was that running a business really is like the best self-development journey you can go on. And I know that, you know, people do say that. And I believe that it is true. I have completely changed the way that I approach everything in my life because I have started my own business as you can imagine. I'm pretty risk averse. And then I went to become a lawyer and that just exacerbated the problem. I went to a large firm, very traditional, and then I went to the government very traditional. I had a very traditional path for so much of my life, you know, school law, school, you know, lawyer at a firm, lawyer in the government. Everything was very predictable. And you know, kind of laid out before me on this yellow brick road that I just had to follow. And starting my own business was like the wild, wild west. I knew nothing about how to run anything. I had never learned anything about marketing. I had never learned anything about selling except for my years at Express. I tell you, that prepared me more for this than anything else. And, and you know, just kind of figuring out how to get clients, serve clients. When I'm the only person doing the serving, I don't have a team of staff who's there to kind of handle all the admin handling my business finances. I have to say handling my personal finances was not always my natural inclination, which I think is why, what makes me a great accredited financial counselor. I had terrible experiences with money when I was younger, but handling business finances is totally different <laugh> than handling your personal finances. So that's also been a bit of a learning curve. And so there's just all of these different facets of my life that I'm so much more adventurous now. I'm so much more open to change, open to experimentation. And you know, I credit my husband with a lot of this because he really started me on the journey. He is a 30 year army veteran, as you can imagine. The way that he approaches problems is very different than the way that I do. He has to operate on limited pieces of information, never knows the answer to any question before he has to just go complete a mission. I would prefer to have everything mapped out in a spreadsheet that spans 10 years, if at all possible. And seeing how he approached things and how he was so supportive of me taking this leap, it really grew me, I think, as a person. And so the biggest lesson that I've learned is how much I can grow as a human being by, by going through these endeavors and you know, kind of continuing to challenge myself.

Dr. Mary Bell Carlson ([18:19](#)):

Man, you do a lot of things because you're also the mother of twins as I see, and you've just got a lot going on. So my question to you is, how do you set boundaries when you own your own business?

Jessica Medina ([18:31](#)):

I will say I'm one of those people I think, yes, I think that you can spend a lot of time in your life developing the muscle and the skill of setting boundaries. I'm also a big believer in a little change of circumstances can go a long way, <laugh>. And so, you know, I didn't start my business when my kids were small. I started my business when they were teenagers and pretty much during the pandemic when, you know, we were all locked in a house, they were, you know, self-sufficient. You know, they were both in high school at that point. And I think that because I had come from, you know, a mindset of overachievement always being on call 24 7, right? This is basically the life of an attorney. It has been very hard for me to set boundaries within my own business because now I love it. It's so, it feels so different when you're like, do I have to set a boundary? But I love what I'm doing now. I thought I only had to set boundaries when I didn't like my job because I needed to make time for self care and all of that other stuff. When your job brings you joy, it's really difficult to set boundaries. And so I work with coaches to help me in this department because it is not my area of specialty and I'm still working on it. But I do think about the benefits that I get when I set some boundaries, especially with, you know, my client's access to me. And in terms of, you know, how many appointments I take on every week or every month and making sure that I bake in time for the things that really do bring, you know, my body, my soul, some benefit. Gotta make time for Hamilton's, right?

Rachael DeLeon ([20:09](#)):

<laugh>.

Jessica Medina ([20:10](#)):

And so, you know, I think thinking through how does this really serve me is how I, I always have to come back to that because if I think about well what do I enjoy doing? I enjoy working in my business. So that's not always the best test of how I should be spending my time.

Rachael DeLeon ([20:25](#)):

I found as a mother, a working mother, that boundaries oftentimes aren't for your own self-care, but you have to set the boundaries for the other people and what they need from you. And so similar to you, Jessica, I think when you're in your work and it's bringing you joy, it's really easy 'cause that's filling you up. So then, you know, creating those boundaries for others too, that is a lifetime journey in itself. <laugh>.

Jessica Medina ([20:49](#)):

Thank you Rachel. I'm gonna take this, this is gonna be my golden nugget from this podcast.

All ([20:54](#)):

<laugh> <laugh>.

Jessica Medina ([20:55](#)):

The boundaries are actually for other people. Jessica. Yeah. So if you wanna think about it,

All ([20:59](#)):



<laugh>,

Rachael DeLeon (21:01):

I love it. All right. Well I have to ask Jessica, you know, we've gone through your whole kind of journey from musical theater to public service to where to AFC <laugh>, why the A FC? What led you to A-F-C-P-E and our community and how has the AFC benefited you in your work?

Jessica Medina (21:18):

Oh my gosh. Well, I have the best story about how I became an AFC. So at the time that I was having my existential crisis about leaving the law, as I said, I was working at the securities and the change commission, right? So I'm at a financial regulator. I'm literally watching the financial sector and also dealing with its nasty underbelly, right? It doesn't leave a great taste in your mouth. 'cause I was in enforcement, so I was basically investigating people who were terrible. And when I decided I didn't wanna be a lawyer anymore, I really just wasn't sure what I would go and do. It was all I had, I had been trained to do. It was what I thought I had was going to do since I had been in high school. And it was really a, a bit of a, you know, a crisis for me in terms of thinking what could possibly be next. But at that point in my life, because I knew that I might not always want to be a lawyer, I had started on my personal finance journey. I had found the financial independence movement, it had really motivated me to get my personal finances in order so I wouldn't feel so trapped in my career as an attorney. And through that I realized, wow, when people say they have a hobby, I don't have hobbies. I mean, I guess I did karaoke, but I guess <laugh>

Rachael DeLeon (22:27):

Hobby,

Jessica Medina (22:27):

That was a big hobby. But that came later in life. My hobby was my own personal finances, playing around with my spreadsheets, figuring out how I could leave work even earlier. Right? What kinds of things could I do in my own life to get there faster? My children will tell you they have not so fond memories of no heat November and Deep Food

All (22:46):

Pantry December <laugh>.

Jessica Medina (22:49):

But those were my, those were my strategies. These were my tools, <laugh> and I enjoyed it. And so as I, my husband was on his path to retiring from the Army and for anyone who has been with a soldier that's retiring, they know that there is a year long program that these ve these future veterans must go through before they get released. And they get trainings on job placement on, you know, just being a, a good citizen out in the, you know, non army society. And they meet with an accredited financial counselor to make sure their budget is in order and they're not gonna become destitute as soon as they leave. And so my husband went into the meeting with my spreadsheets of what I had been planning for us to do after he left and the counselor said, is your wife interested in doing this? Because these are way better than our materials. And I think for

All (23:39):

That, um,

Jessica Medina (23:41):

If she is like, you know, open to this kind of work, I think she could be really good at it. And we were having, we were having our, you know, post AFC meeting together and he said, yeah, this is what the counselor said. And I said, is this a thing that people do? Is this a job like helping people budget <laugh>? Are you kidding me? Because all I had been exposed to was investments, right? Financial products, very complex, you know, financial sector activity. I didn't know that the AFC was even a thing. And when I learned about it, the more I learned about it, the more it became clear to me this is exactly what I wanna do. This is how I want to help people. This is exactly the kind of money advice that I want to be giving people because I felt like I didn't have resources to help me when I was going through it on my own. And so I remember, you know, announcing to my friends at the SEC that I was gonna be leaving to become an accredited financial counselor. I didn't want there to be any ethics issues with my agency and you know, kind of my new career that I was going to embark on. So I wanted there to be a clean break. And they all were also just like, well what does that mean? Whatcha are you gonna help people with? And I said, you know, budgeting, <laugh> paying

All (24:51):

Off debt,

Jessica Medina (24:52):

You know, whatever people think they can do on their own, but they never get around to doing it. And they were just like, well that is freaking brilliant. Can you call me when you

All (24:59):

Leave?

Jessica Medina (25:01):

'cause I could use these services <laugh>,

All (25:03):

Right?

Jessica Medina (25:05):

And I think that especially for, you know, and I realize this on my own journey, you know, kind of starting my business and thinking about who I wanted to work with, I realized that a lot of lawyers in particular are terrible at asking for help. And they don't have resources to help them with the basic money management because everyone assumes they already know how to do it and they don't want to relieve you of that assumption. And so they just go along bumbling trying to figure out what to do. And they're constantly bombarded with requests from investment advisors and folks who wanna grow their money that don't realize they don't have any money to grow. They can barely manage what they have coming in. And so I knew there was a hole in the industry in terms of people who could help, you know, these types of professionals who maybe, you know, appear very successful and appear to be experts in everything on the outside, but are really struggling on the inside. Because that's how I felt when I was practicing. And so becoming an AFC was the perfect spot in the financial sector for me. And I'm so happy that I found the program. I'm so happy I found the community. You asked, you know, kind of what, what drew me specifically to the AFC program. I'm an attorney, I am used to a lot of oversight. Okay, I went to school, I took a bar exam, I have continuing education requirements, I have ethics requirements. Would you believe that all of those things are part of the AFC program? It's like a warm, fuzzy blanket that I wear at night, right? <laugh>, this is exactly what I like, this is where I wanna live. I love that I get to see other



AFC professionals at the symposium that we're all continuing on our journey of knowledge of personal finance concepts and how to work with our clients. I love that it was about counseling. I mean, I was a counselor at law. It just, now that I think about it, it's such a perfect fit for who I am as a person and what I had been doing throughout my career, but there's no way I would've known that this was what I would end up doing right back when I was aiming for musical theater in high school or even when I was in law school. But I'm so happy I found it.

Dr. Mary Bell Carlson ([27:08](#)):

Jessica, your story is so interesting to me because you've, you've gone through so many different transitions in your own life, and I'm curious, as you're sitting there talking about being the wife of a retired soldier, there's a lot of transitions in that life too. So how did you make this work with all of the transitions that happened and are happening in your own life?

Jessica Medina ([27:29](#)):

I think I specialize in helping people with transitions because it is cathartic for me. Transitions are so stressful. And to your point, Mary, I have been through a number in my life. You know, the biggest transition that I went through was when I was in law school. I actually, I had my twins in law school and I was a single mom for nearly 14 years before I met my husband. And so, you know, the transition of becoming the head of household in the middle of your legal education and then having to pivot drastically of what you think your career is going to be, that was a really big transition for me emotionally and financially, to be fair. And then transitioning to the government from my firm, I had to work through the fear of not making the kind of money that I had been making before, still being able to support my family and just changing work, right? And changing my community of people. The transition to leave the law entirely, as I said, was really bolstered by my husband being part of my life. I met him while I was working for the government at that point. I had time to hang out and we, I will say

All ([28:35](#)):

<laugh>,

Jessica Medina ([28:37](#)):

I met my husband when I was doing competitive karaoke, so it's obviously a big part.

All ([28:43](#)):

<laugh>,

Jessica Medina ([28:45](#)):

It's a big part of my life. It's a big part of, you know what all, all of the good things in my life are because of karaoke, right? I mean, <laugh>,

All ([28:52](#)):

It's, it's come in full circle.

Jessica Medina ([28:54](#)):

That's right. This is the theme. But once he came into my life and showed me a different way of looking at the world, he really was a big element in making that transition easier. It also helped to have another breadwinner in the house, right? Let's not be, let's not, you know, hide the ball here. It was nice to not be the sole breadwinner for the first time in my adult life. And so, you know, I think going through those

transitions and then starting my business and watching him leave the military, begin his own career, we are currently building a vineyard in the mountains outside of Asheville, North Carolina, because that's his transition story. He's always wanted to make wine. And so that's what we're working on now. And so, yes, I'm in the middle of another transition, <laugh>

All ([29:40](#)):

Trying

Jessica Medina ([29:40](#)):

To keep it all together, but helping my clients through their own transitions, I think actually calms my own nerves about all the transitions that I am, you know, constantly managing in my own life. And so it's just this wonderful circle where my clients, you know, feed my need to be able to see a transition through and then my transitions help inform my client's. Future transitions is just a really, really nice symbiotic system that I have set up here.

Rachael DeLeon ([30:07](#)):

Jessica, at the end of every interview, we always ask our guests to share their 2 cents. If you had one piece of advice to leave with our listeners, what would it be?

Jessica Medina ([30:17](#)):

My one piece of advice would be, if you are trying to build your business, do not underestimate the power of social media. If you show up where your people are, if you show up as yourself and you show them that you can provide value, you can build a business.

Dr. Mary Bell Carlson ([30:33](#)):

That's awesome. You have been such an incredible guest and we're so glad to have you on the show today. Please tell our listeners where they can connect with you.

Jessica Medina ([30:40](#)):

You can find me@jessicamedinallc.com. That's my website, or come play with me on LinkedIn. It's Jessica Medina llc, I'm prolific on there. I'd love to have a conversation with you. Come check us out or

Dr. Mary Bell Carlson ([30:53](#)):

Meet up at karaoke night <laugh> <laugh>.

Rachael DeLeon ([30:57](#)):

Thanks so much, Jessica.

Jessica Medina ([30:58](#)):

Oh, this was really fun. Thank you,

Rachael DeLeon ([31:01](#)):

Mary. This was such a great conversation with Jessica today. I've gotten to know Jessica through some work that she's done within the A-F-C-P-E community, and she's just such a joy to be around such a natural connector, always willing to share and engage with others, and such an advocate for the value of the A FC. So it was really fun to dig into her journey. I think so often people think that if they didn't have

a background in personal finance from the jump, you know, it's such a hard transition into the field, but we're seeing more and more career changers, and especially in that private practice space. I think people are inspired by their own journeys and the communities that they're serving and that they're living in, and they feel that tug to give something back to where they came from or where they live. And so loved all of the nuggets of wisdom that she shared. Some really great intentionality on building referral partners. And one of the things she said is leading with, how can I help you? That's the way we lead when we meet with our clients, but it's also the way to lead as you're building community and connections with in the field, when you lead with that kind of energy, oftentimes you receive that in return. So love being able to interview people like Jessica, and so excited to see her again this November.

Dr. Mary Bell Carlson ([32:20](#)):

I felt like that was such rich content that was both unique. She had such a unique niche, but also at the same time, she's so relatable. We have so many that transition multiple careers just like she has over time. But I really love how she's taken that positive spin on all these various transitions in her life and just made amazing things out of it. I also love her honesty because if you heard at the very beginning, she actually said, give yourself some time. When you launch your own firm, it doesn't start up right away. And so give yourself time and space and grace along that path and the journey. There were just so many nuggets of wisdom along the way. In fact, if you follow her on social, you can see how relatable and connectable she is. She really shows her personal side as well. And I think there's some great information in here, whether you're working for a firm or whether you're out on your own. She really helped me connect with some things that I had been wondering as well. And so it's always fun to talk with Jessica, and we hope that you'll join us at this year's annual symposium and talk with individuals like Jessica. We would love to see you there. And registration is now open, so join today.