

NEWS



For Immediate release

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Alliance of Comprehensive Planners Salutes ACP Certified Member Courtney Ranstrom

InvestmentNews Names Ranstrom to 40 Under 40 List of Financial Professionals Dubbed “The Future of Our Business”

WILMINGTON, NC – July 29, 2020 – The [Alliance of Comprehensive Planners \(ACP\)](#), a group of tax-focused financial planners that adhere to the Fiduciary Standard, today announced that one of its certified ACP members, Courtney Ranstrom, has been named to the 2020 InvestmentNews 40 Under 40 list. The InvestmentNews 40 Under 40 project highlights young talent in the financial advice industry. Ranstrom, 38, is co-founder and a fee-only financial planner at [Trailhead Planners LLC](#), a firm that does tax preparation as a part of its retainer-based service plan, which also includes comprehensive financial planning and investment management based on functional asset allocation, which is a primary component of the ACP methodology. She also heads diversity and inclusion efforts for the ACP.

Now in its seventh year, the 40 Under 40 program received nearly 1000 entries submitted online. The editorial staff of *InvestmentNews* selected all 40 honorees based on the criteria of accomplishment, contribution, leadership and promise.

“The 40 individuals profiled here exemplify the talent of the young advisers and associated professionals who are building and expanding the financial advice industry,” said InvestmentNews’ Special Projects Editor, Liz Skinner. “What each has achieved – before turning 40 – will astound and entertain you.”

When asked to identify her passions, Ranstrom quickly picks three: “babies, finance and fairness.” Those loves — along with a passion for mental and physical wellness — are woven into her Portland, Oregon, lifestyle and her work at the Registered Investment Advisory (RIA) firm she founded with her brother, Morgan Ranstrom, who is based at a second office location in Minneapolis. Mr. Ranstrom is also a certified member of the Alliance of Comprehensive Planners, the community of tax-focused financial planners operating under a retainer model. In January 2020, they added a third partner, Bill Mulvahill, who is a CPA, CFP®, and certified member of the Alliance of Comprehensive Planners.

In addition to her work as a planner, Ranstrom is also chair of Northwest Mothers Milk Bank, which provides donor breast milk to infants whose mothers are unable to nurse.

Ranstrom, along with the others making the seventh annual 40 under 40 list, is highlighted in the June 29th issue of InvestmentNews and online at investmentnews.com. For more information visit 40under40inadvice.com.

ABOUT THE ALLIANCE OF COMPREHENSIVE PLANNERS

The Alliance of Comprehensive Planners (ACP), is a community of tax-focused financial advisors who provide comprehensive tax and financial planning strategies for their clients on a fee-only (commission-free) retainer basis. ACP members are required to maintain the CFP® or CPA/PFS (or equivalent) designation, complete ACP’s rigorous training program, and meet some of the highest continuing education requirements in the industry. The ACP business model, proven methodologies and professional community provide an attractive structure for CPAs, CFPs and other financial professionals who want to serve their clients in a truly holistic, conflict-free manner. A helpful grid that shows costs and benefits for each ACP membership level is shown here: <https://www.acplanners.org/acp/membership>.

ABOUT TRAILHEAD PLANNERS LLC

Co-founded by siblings Courtney Ranstrom and Morgan Ranstrom, Trailhead Planners is a fee-only financial planning firm with offices in Portland, Ore. and Minneapolis, Minn. providing investment management, tax planning, and financial planning services. [Courtney Ranstrom](#) has been working in the wealth management industry since 2009 and is a CERTIFIED FINANCIAL PLANNER® professional. Prior to that, she worked as an internal auditor in both government and a publicly-traded company. She received a Master in Business Administration from Willamette University in 2005. Trailhead Planners collaborates with aspirational individuals and families to develop, execute, and realize their vision of financial freedom. For more information, visit trailheadplanners.com.

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