

NEWS

For immediate release

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*Peace
of Mind*
Financial Planning Inc



Linda Y. Leitz, PhD, CFP®, EA

Dr. Linda Y. Leitz, CFP[®], EA receives 2021 “Bert Whitehead Visionary Award”

*Peace of Mind Financial Planning, Inc. Founder Receives
Honor from at Alliance of Comprehensive Planners’
Annual Conference*

COLORADO SPRINGS, COLO. [November 16, 2021] – Linda Y. Leitz, PhD, CFP[®], EA, founder of [Peace of Mind Financial Planning, Inc.](#), was awarded the 2021 “Bert Whitehead Visionary Award” by the [Alliance of Comprehensive Planners \(ACP\)](#) at their annual conference, which was recently held at the Atlanta Marriott Marquis. The award, which was created in ACP founder Bert Whitehead’s honor and bears his name, serves to recognize an ACP member who exemplifies the ACP methodology and successfully utilizes its principles, demonstrates vision and innovation in the financial planning field, and has made significant contributions to the growth and well-being of ACP as an organization.

FOUNDING A FEE-ONLY PRACTICE

ACP Board President, Tim Sullivan, CFP[®], EA, presented the award to Leitz at the event in Atlanta. “About 20 years ago, Leitz and her business partner at the time were looking for a business model to transition their financial advisory practice from a fee-and-commission practice to a fee-only practice. They found Cambridge Advisors, founded by Bert Whitehead, the predecessor organization to what we know today as ACP. This was the beginning of Linda’s passion for and commitment to the ACP methodology and community.”

“I came for the training but stay for the community,” said Leitz. “The tools and systems are wonderful, but the people are ACP’s real value. You cannot put a price on the benefit of having all of your fellow ACP members in your virtual back room.”

“Fast forward to the present and Linda is successfully running her firm, Peace of Mind Financial Planning in Colorado Springs. She is helping individuals and families gain more control of their finances so they can live the life they want. She is a staunch proponent of the ACP methodology and has given back to her tribe in spades,” said Sullivan.

LEITZ AS MENTOR AND LEADER

“Linda has been instrumental in training others in the ACP System and worked with ACP training guru John Einberger to formalize the Group Instruction program. She is currently chair of the Training Committee and has served ACP in numerous other capacities, including mentoring new members, talking to member prospects, and contributing as an ACP media spokesperson. She generously shares her knowledge with others on webinars, conference breakout sessions, and the Member2Member discussion forum,” added Sullivan.

“Linda is one of those people of substance who makes ACP an important community in the wider financial world. She believes consumers are best served by a strong financial planning profession with rigorous standards, so she donates a significant amount of personal time and talent to organizations that further the profession,” said Sullivan.

ABOUT THE ALLIANCE OF COMPREHENSIVE PLANNERS (ACP)

The Alliance of Comprehensive Planners (ACP) is a community of tax-focused financial planners who provide comprehensive planning strategies for their clients on a commission-free retainer basis. As fee-only fiduciaries, ACP members are required to maintain the CFP® or CPA/PFS (or equivalent) designation and complete ACP’s rigorous training program.

To learn more about this fiduciary network or to find a certified ACP member, visit www.ACPlanners.org.

ABOUT PEACE OF MIND FINANCIAL PLANNING, INC.

The founder of Colorado-based Peace of Mind Financial Planning, Inc., Linda Leitz has authored two books, [The Ultimate Parenting Map to Money Smart Kids](#) and [We Need to Talk – Kids & Money After Divorce](#). She is routinely quoted in national publications including The Wall Street Journal, US News, and Morningstar and has appeared on CNBC. Since 2012 she is one of the writers for a weekly personal finance column for The Gazette in Colorado Springs.

As a commission-free, fiduciary financial planner, Leitz is a member of the National Association of Personal Financial Advisors, the Financial Planning Association, the Alliance of Comprehensive Planners, XY Planning Network, and the National Association of Tax Professionals. The firm specializes in meeting clients where they are on their journey to financial independence, providing tax and financial strategies aimed at maximizing the client’s financial well-being.

Leitz was appointed to serve on 2016-2017 Commission on Standards for the Certified Financial Planning Board, is past chair of the National Board of the National Association of Personal Financial Advisors and also served on that organization’s West Region Board of Directors. Her

stature in the financial planning community brings attention to and reflects the credibility of the organization.

Leitz obtained a PhD in Personal Financial Planning from Kansas State University, an MBA from Southern Methodist University, and a BA in Business Administration from Principia College.

To learn more about Peace of Mind Financial Planning, visit:
www.PeaceOfMindFinancialPlanning.com.

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