

Colleen Geiss, CFP®

Vice President, Financial Advisor



Contact Colleen Geiss

Yardley Office

385 Oxford Valley Road, Suite 320,
Yardley, PA 19607

267-391-5241

colleen.geiss@wfafinet.com

Collegeville Office

555 Second Avenue, Suite
D-300, Collegeville, PA 19426

Colleen was taught the value of financial independence at a young age from her father.

Now as a financial advisor, Colleen stresses the importance of building a strong financial foundation.

From establishing emergency funds as early as possible to taking advantage of employer-plan matches, she believes in empowering her clients through financial education, providing the tools necessary to help all of her clients to feel confident, comfortable and prepared to achieve their aspirations.

Taking Emotion Out of Money

Every stage of life comes with its own emotional energy, from building assets during working years to the excitement of retiring—even the potential worry surrounding one's estate.

Colleen's calming presence and thoughtful process are fundamental to creating rational plans for where her clients are in life.

Her completion of the highly accelerated CERTIFIED FINANCIAL PLANNER® certification from Temple University informs recommendations that are steady, practical and easy to understand.

Proper Planning Prevents Poor Performance

Deliberate, thorough action has to be delivered

for a plan to succeed. Colleen's dedication to understanding her clients' situation and goals translates into a plan for the life her clients want to live.

After all, actionable advice comes from accurate information. Colleen's masterful communication skills ease any intimidation clients might feel, allowing them to open up and talk about their situation without judgement.

Outside the Office

Colleen is a Mountaineer from West Virginia University, where she graduated Summa Cum Laude. She served as her sorority's President, which she continues to volunteer through the Chi Omega Philadelphia Alumnae Association as the chapter's Treasurer. She also gives back to her community as a member of Soroptimist International, a women's organization devoted to providing resources to promote education and social empowerment.

Colleen enjoys experimenting with different recipes, traveling to new places, and spending time outside running, hiking or golfing.

California Insurance License Number 4314567 Resident State PA

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