



## Profile

### **Judith (Judi) Martindale CFP, EA**

A nationally recognized author, speaker and expert in financial planning, Judi Martindale has been named one of America's top 250 financial planners by *Worth* magazine.

She has co-authored two books that have helped thousands manage their money more effectively, *No More Baglady Fears: A Woman's Guide to Retirement Planning* and *52 Simple Ways to Manage Your Money*. She served as technical editor for *The Complete Idiot's Guide to a Great Retirement* and her financial advice has been quoted in the *Wall Street Journal*, *New York Times*, *LA Times*, *Investor's Business Daily*, along with various other publications throughout the country.

Judi also served as weekly financial commentator on the CBS-affiliate KCOY-TV Evening News for four years and hosted her own radio show, *San Luis Success Story*. As a fee-only planner and former educator she speaks regularly to business, professional and non-profit organizations.

After more than 20 years in practice, following the tradition path of growing a very successful business, Judi has "opted out." She came to the realization that her success in business was actually leaving her little time for something she looked forward to most, connecting with each client on a personal level.

After much reflection and thought, she came up with the concept of The Retreat House, a financial bed and breakfast where clients can not only work on their financial strategies, but also align them with their personal, spiritual and life goals. Located just steps away from the ocean, clients can walk along the beach after their morning session to reflect and relax before tackling the next phase of the process.

Judi received her Masters in Education (M.Ed.) at Miami (of Ohio) University. She is also a Certified Financial Planner and is enrolled to practice before the IRS. Professional memberships and affiliations include the National Association of Personal Financial Advisors, (NAPFA), Financial Planning Association and National Association of Enrolled Agents. Judi is an Integral Coach certified through New Ventures West.

To learn more about Judi and The Retreat House, visit [www.judimartindale.com](http://www.judimartindale.com).