A specialty practice to Shepherd Financial Partners

Alexandria Nadworny, CFP ®, CTFA
Wealth Advisor
Special Needs Financial Planning Specialist

As every graduate knows, there is no shortage of advice given to them when they begin their professional lives. Alex connected with the advice from Steve Jobs: "The only way to do great work is to love what you do." For her, the continuous thread inspiring her throughout her life was her family's focus on making the world a better place for her brother James, who has Down Syndrome.

Alex began her advisory career working with traditional clients on retirement planning and earned her Certified Financial Planner™ (CFP®) credential. She joined Special Needs Financial Planning, continuing her own general wealth management practice and having a key role on the Special Needs Financial Planning team, working with client families to educate and advise the next generation of family members. She has been featured as a speaker and in the media on this topic.

As a sister and future guardian of James, Alex has a deep understanding of all of the roles and responsibilities that may need to be filled one day. She shares her thoughts on this and other topics in a video from Investment News that may be found on the Special Needs Financial Planning website.

Understanding that no one can replace a parent, Alex created a program called A Team to Carry On; a succession plan for parents of adult children with a disability. The plan focuses on the time when parents are no longer able to do all they do for their loved one and provides guidance and encouragement to outline a team of family, friends, community and professionals to step in.

Advocacy
Alex's commitment has taken the team's educational outreach efforts to a new level. She coordinates all workshops and presentations for the team and is a sought-after speaker in her

own right, presenting special needs planning workshops to families, organizations and professionals nationally. Inspired by her family's leadership in advocacy, she is an active participant in several organizations and fundraisers designed to benefit individuals with disabilities. Alex is the Vice President of the Massachusetts Guardianship Association (MGA) and is on the board of the Department of Developmental Services (DDS) local Citizens Advisory Board and is area liaison to the Massachusetts statewide Advisory Council. The Department is devoted to creating, in partnership with others, innovative and genuine opportunities for individuals with intellectual disabilities to participate and contribute to their communities as valued members. In addition, she was selected to be a part of the DDS initiative in Creating a CommonWealth.

Professional Certifications and Education
Alex is a CERTIFIED FINANCIAL PLANNER™ practitioner, (CFP®), a Certified Trust and Financial Advisor, (CTFA).
Alex holds a BS in Business & Marketing from Western New England College.

About Alex
Aside from community service, Alex enjoys traveling, experiencing different cultures, photography and the beaches North of Boston.

Important fact: Be prepared; know that if you are taking a meal with Alex, she may pull a bottle of hot sauce from her purse.

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