CC Anthony CC Anthony @drccanthonyfinance

DR. CECILY "CC" ANTHONY, AAMS®

FINANCIAL EDUCATOR & SPEAKER

Not Your Average Boring Financial Advisor

📍 Licensed Nationally

In-Person and Virtual Speaking Engagements

Founder of the NextGen University of Financial Literacy & Entrepreneurship

Host of the What the Money Podcast

Products and Services

401(k) Plans, SEP & SIMPLE IRAs | Annuities | Roth IRAs | Traditional IRAs | Brokered CDs | Life Insurance | IULs | LIRPS | Disability Insurance | Long-Term Care | Education Savings Plans | Tax-Advantaged Investment Strategies | Complimentary Retirement Strategy Sessions & Planning and Complimentary Wills & Trusts for my Clients

Available for keynotes, panels, workshops, and lunch-and-learns.

Signature Topics

Foundations of Investing
Start your wealth journey with strategy and purpose—ideal for beginners and young professionals.

Leave It, Move It, Roll It, Take It: Rollovers & Transfers
Understand what to do with old 401(k)s and employer plans—and how to avoid common rollover mistakes.

Creating Your Estate Plan
Beneficiaries, wills, trusts, life insurance, and taxes—made simple so you can protect your legacy.

The Markets Today: Performance, Volatility & Opportunity
A real-time look at what's happening in the markets and how investors can position themselves wisely.

Social Security Simplified
- 3 Myths That Could Cost You Thousands
- What It Is & How to Maximize Your Benefits

The Value of Time: The Beauty of Compounding Interest
See how small, consistent actions create lasting wealth—perfect for youth and early investors.

Is the U.S. Dollar Losing Its Lead?
A thought-provoking discussion about global currency shifts and investor impact.

Is Paying Off Your Mortgage Early the Right Move?
Explore the pros, cons, and opportunity costs from a financial advisor's perspective.

Stock Market 101 & Stock Market 101 for Kids
Educational and engaging sessions that simplify investing for every age group.

The 3 D's of Investing
Diversification, Dollar-Cost Averaging, and Discipline—the foundational habits for successful investing.

Say "I Do" to Profit
A lively session designed for wedding planners and professionals in the wedding industry to understand personal and business investing.

How to Invest in Stock Options
Understand the fundamentals of options strategies, risk, and reward.

Wealth & Wisdom: Why Women Need Their Own Financial Security
Empowering women to take charge of their finances and design the future they deserve.

Career Day: I Am a Financial Advisor
Inspire students with real-world insights into the finance profession.

Turning Bricks into Wealth
A Financial Advisor's perspective on how real estate and market investing work together to build wealth.

> Dr. CC's energy is contagious! She makes complex financial topics simple and inspiring.
> — Event Organizer, Women's Expo

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Signature Topics cont'd

Faith. Focus. Finances.
Discover how aligning your faith with your financial goals can create true peace and purpose. In this empowering session, Dr. CC blends Biblical principles with practical money wisdom to help you build wealth, live generously, and steward your blessings with confidence.

Personal Budgeting & Long-Term Goal Planning
Discover how to take control of your cash flow, align spending with your values, and create a roadmap for future financial milestones.

Family Economics: Teaching Kids the Value of Money
Practical ways to raise financially savvy children who understand earning, saving, and giving.

Where to Retire Outside of the U.S.
Explore the most affordable and lifestyle-friendly retirement destinations abroad — including cost, healthcare, and tax considerations.

How to Pay Off Debt
Simple, actionable strategies to eliminate debt faster and free up cash flow for long-term wealth building.

Buying a Home
Understand the full financial picture of homeownership — from budgeting and credit to mortgages and equity growth.

Creating Paychecks in Retirement
Learn how to turn your savings into sustainable income streams for life, using smart withdrawal and investment strategies.

Bitcoin & Beyond: The Speculation Game
A balanced conversation about cryptocurrency — what it is, how it works, and why it remains a highly speculative space.

I Have a Business Idea — Where Do I Start?
Step-by-step guidance on how to turn an idea into a legitimate, financially sound business with purpose and profit.

Wills & Trusts that Protect Your Family and Your Future
The stuff no one explains about wills and trusts, and how they protect your family when life doesn't go as planned. The paperwork you hope you never need, and why your family will thank you for it.

"DON'T SEE A TOPIC THAT YOU'RE INTERESTED IN, SEND ME YOUR REQUEST!"

AUDIENCES SERVED

- Military Veterans
- Physicians
- Chefs
- Educators
- Realtors
- Women's Empowerment Conferences
- Small Business & Entrepreneur Groups
- Faith-Based Organizations
- Universities & Career Days
- Networking & Professional Associations
- Family & Legacy Wealth Events

> Dr. CC delivers financial education with heart, humor, and clarity. She has a rare ability to take complex topics and make them both relatable and actionable. Whether she's speaking to business owners, retirees, or students, her sessions leave audiences inspired, informed, and ready to take control of their financial future. –
> Event Organizer, Client Appreciation Event

Bio

Dr. Cecily "CC" Anthony, AAMS®, is a Financial Advisor and a Professor of Finance, Business, Hospitality and Economics. With over two decades of experience and a Doctorate in Organizational Leadership, she blends practical money wisdom with real-life insight.
Her speaking style is engaging, relatable, and empowering—making complex financial concepts simple and actionable for audiences of all backgrounds.

Please feel free to reach out with any questions.

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