



As a Financial Expert, Speaker, Author, Mediator, and Expert Witness, Teresa Dentino delivers next-level content through easy-to-manage and substantive consultations, trainings, and presentations that leave clients and audiences informed and ready to hit the ground running.

### LECTURE AND TRAINING TOPICS

Contingency Planning: The Financial Fire Drill

The Financial Issues of Divorce Transition

Critical Financial Dialogs within the Family Structure

Facilitating Financial Dialogs within the  
Family Office

Instilling Family Values within Legacy Planning and  
Philanthropic Planning

### FOR LEGAL and FINANCIAL PROFESSIONALS AND INSTITUTIONS

Best Practices: Financial Communications with Today's  
Female Client

Myths & Realities: Gender-Based Financial Decision-Making

### MEDIA

Rob Black and Your Money Show

The View From the Bay - ABC-7 KGO San Francisco

The Money Show - WGN Radio - Chicago

CBS MarketWatch

The Wall Street Journal

San Francisco Business Times

Physician's Money Digest

Worth Magazine

Women's World

*For more information contact  
Teresa Dentino*

Since 1985 Teresa Dentino has used her financial industry expertise to advance critical financial **Best Practices, Education, and Literacy, raising the bar for next-level financial advisory services.**

Today her development of enriched financial communication and methodologies provides individuals, families, family offices, legal and financial professionals with **next-generation tools, information, and delivery-mechanisms** that improve the client experience while achieving better financial outcomes.

Additionally, Teresa pioneered and developed groundbreaking **financial education for women in 1985** -- long before Wall Street would recognize them as an investor class.

Understanding the unique issues and risks women face, given their longevity and likelihood to inherit the **Financial GateKeeper** role within the family structure, she developed programs that address the most vital financial aspects of major life transitions.

In her articles, consultations, lectures and trainings, Teresa delivers **new-paradigm yet substantive insights** on such topical concepts as:

Contingency Planning: The Financial Fire Drill  
The Financial Issues of Divorce Transition  
Facilitating Financial Dialogs within the Family  
Office

Instilling Family Values within Legacy Planning  
and Philanthropic Planning

Teresa's unique expert standing is further **supported by her knowledge of the seminal academic studies of investment behavior and psychology**, and their import on financial behaviors and outcomes.

The core foundation of her research, programs, consultations, and trainings is that **education is the key ingredient for achieving successful financial outcomes.**

Articulating sound financial dialogs within the family, along with facilitating next-level professional communications is foundational to avoiding the wasteful toll of unnecessary financial and emotional costs.

In addition to working directly with private clients, families, family offices and training legal and financial consultants, she provides **expert witness financial analysis and education** in high-asset divorce cases.

Teresa earned the National Association of Securities Dealers licenses (NASD Series: 7, 3, 63, 65, and 24) in San Francisco in 1985, and achieved the highest designation of Principal.

Through the **Chartered Financial Analyst** program, she completed post-graduate studies in Economics, Financial Accounting, Equity Analysis, Fixed Income, and Quantitative Analysis. Teresa is also a **certified mediator**. Today she resides in Woodside, California with offices in both Woodside and San Francisco, CA.

## WHAT CLIENTS SAY

*"We have witnessed disastrous and appalling abuses to women in the financial arena in the context of portfolio construction and misleading advice. Perhaps the best way to eliminate these abuses is to educate the consumers so that predatory practices are ineffective.*

*It is terrific to see the education and myth-busting process reach the broader public through your services. You are doing a great service."*

*~ Loren W. Walden, CFA, Investment Advisor and Partner, [Blue Oak Capital, LLC](#)*

*"We recently settled the [Private Client] divorce case. Your work was instrumental in helping [Client Name] see how the settlement would benefit her both near-term and long-term."*

*~ Esther Lerner, Family Law Attorney, San Francisco, CA, [Lerner Law Offices](#)*

*"...As for Teresa, she has been very understanding, compassionate and very encouraging. She applauds a job well done. She has been a beacon of light for me. Teresa has also taught me to be comfortable with my financial responsibilities. I stay involved..."*

*~ Private Client preparing for the [Financial GateKeeper](#) role*

*"Earlier this month Teresa Dentino conducted two financial seminars for tenants of Embarcadero Center as part of the Concierge Office's quarterly "Speaker Series". The seminars were very successful and feedback from tenants so positive that we are already planning to have Teresa conduct additional seminars next year! Teresa deserves much of the credit for the success of the financial seminars. She was able to present complex concepts in a way that novices could understand. Her obvious expertise and ability to communicate effectively went a long way toward making the seminars such a success."*

*~ Monica Magee, Director of Concierge Office, [Embarcadero Center](#)*

*"Thanks so much for bringing a great presentation and your wealth of knowledge to our Women's Forum. I've gotten a lot of extremely positive feedback already. Personally I thought you were great and that we were all very fortunate to have you take your time and spend it on us. Look forward to seeing you again in the future."*

*~ Kriss Elizabeth, Director, [Women's Forum, Golden Gate University](#)*

*"On behalf of the American Women's Society of Certified Public Accountants (AWSCPA), I want to thank you for speaking at our program in San Francisco. The program was a tremendous success with a great turnout!*

*Your presentation entitled "Personal Finance: Smart Women, Wise Investing" was very well received in our group. I spoke with many of our members afterwards and we found the tips useful and most importantly, timely! Hopefully we will reap some of the corrections in this bull market! Your sense of humor and "get-over-the-fear" approach to investing was great.*

*Teresa, you are a wonderful speaker and we hope to have you speak again sometime in the near future."*

*~ Sonja Pecavar, Director of Programs, [American Women's Society of Certified Public Accountants](#)*