

Natalie N. Freeman, CEPA®

Financial Advisor

Exit Planning &
Legacy Strategist

Transformational
Speaker

Empowering leaders to build sustainable wealth,
profitable enterprises, and meaningful legacies.



When strategy meets service, impact multiplies.

Financial clarity fuels confidence, and confidence fuels leadership.
True significance over success is found in living on purpose, in
purpose—achieving maximum impact for the communities we serve.



The Veteran Strategist

30+ Years in Finance & Tax |
Principal at Edward Jones |
Founder, Freedom
Financial Consulting

The Exit Expert

Certified Exit Planning
Advisor (CEPA®) | Guiding
multi-million dollar
enterprise transitions

The Master Storyteller

Author of *LEADing Ladies* |
Host of *Successful But Single*
(49+ Episodes) | Master
Storyteller Academy Graduate

The Resilient Leader

Single Mother of 22 years |
Half-Marathon Finisher |
Passionate Golfer

Technical Mastery

- Tax Efficiency & Advanced Planning
- Enterprise Valuation & Exit Readiness
- Estate & Multi-Generational Legacy Strategies
- \$250k+ High-Net-Worth Advisory

Transformational Leadership

- Women's Financial Empowerment
- Executive Coaching & Accountability
- Navigating Adversity & Reinvention
- Organizational Behavior & Board Governance

Holistic Stewardship:
Where financial precision meets purposeful living.

Signature Speaking Tracks

Track 1: The Wealth & Exit Strategist

For corporate audiences, founders, and executives seeking tactical financial blueprints.



Track 2: The Leadership Mentor

For women's conferences and ERGs focused on empowerment and economic influence.



Track 3: The Lifestyle Architect

For broad audiences seeking mindset shifts, resilience, and purposeful living.



Track 1: Wealth Strategy & Enterprise Value

Teaching entrepreneurs to scale to sell, on their own terms.

The Exit Journey

Step 1: Profitability Clarity



Tax efficiency and financial systems.

Step 2: Valuation Readiness



Accelerating enterprise value and structural health.

Step 3: The Liquidity Event



Succession planning and CEPA®-certified exit strategies.

Step 4: Generational Wealth



Estate planning and legacy preservation.

Target Audience: Best for Founders, High-Net-Worth Individuals, and Executive Boards.

Track 2: Women's Leadership & Economic Power

Preparing women to step confidently into financial stewardship and influence.

**The Great
Wealth Transfer
is coming—and it
is transitioning
to women.**

Key Keynote Topics

- ✓ LEADing Ladies: Every Lady is a LEADing Lady.
- ✓ From Imposter Syndrome to Investment Confidence.
- ✓ Acquiring the skills to manage wealth—not just for today, but for tomorrow.

Track 3: Step Up to the Tee Box

How the fairway teaches us to live on purpose, in purpose.



Step 1: Your Race, Your Pace (The Stance)

The illusion of competition.
Resisting social comparison,
focusing on your own course,
and easing anxiety to
improve your game.

Step 2: Hole by Hole (The Swing)

Navigating transitions.
Tackling different
elevations, hazards, and
daily challenges without
demanding perfection—
just showing up fully.

Step 3: Get a Caddy (The Follow- Through)

The power of the team.
Why the greatest pros never
walk the course alone, and
how to build a network of
mentors and coaches.

Cultivating Community: The Successful But Single Podcast

**“Boss first, bae later.
Or not. You decide.”**

Topics Mastered

**Generational
Wealth Building**
(w/ HR Leaders like
Ginia Warren)

**Tactical
Entrepreneurship**
(w/ Veteran CEOs like
Brian Gordon)

Scaling to Sell
(w/ Founders like
Dawn Boyd)

**Radical Forgiveness
& Holistic Health**
(Connecting emotional
healing to physical wellness)



Tailored Impact: Who She Serves

Entrepreneurs & Business Owners

Seeking sustainable growth, profitability workshops, and clear exit strategies.

High-Net-Worth Individuals

Requiring advanced tax strategy, estate planning, and legacy preservation.

Women in Leadership

Looking for mentorship, financial literacy, and the confidence to claim economic power.

Veterans & Military Professionals

Transitioning to civilian financial life and securing corporate/government funding.

Proven Impact & Concrete Outcomes

Enterprise Value

Accelerated company sales and preserved multi-generational wealth for mid-level enterprises nationwide.

Community Funding

Secured significant government and corporate funding for Hillsborough County Veterans Helping Veterans (Oct 2025).

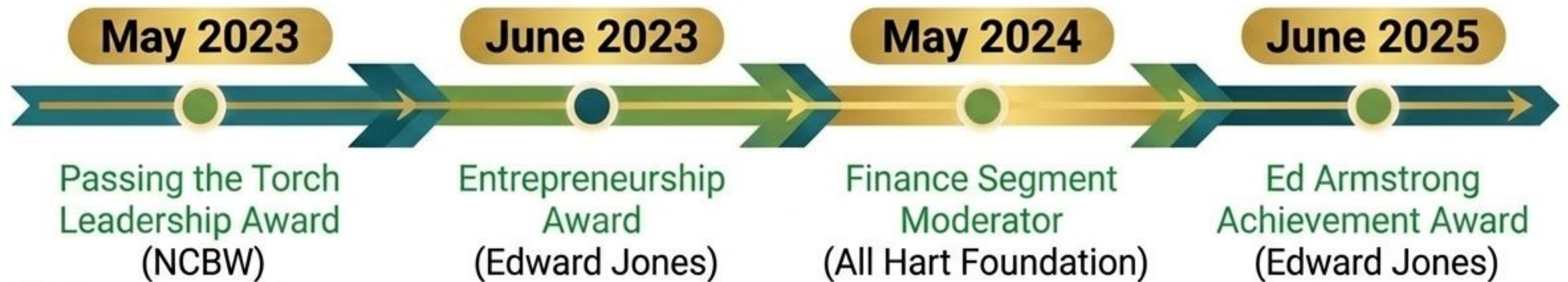
Executive Accountability

Delivered group financial mentoring and executive coaching that measurably elevated board governance and organizational behavior.

Financial Literacy

Transformed financial anxiety into strategic capacity through nationwide profitability workshops.

Recognized Authority & Media Presence



The ROI of Your Next Keynote

Traditional Speakers

Generic inspiration.

Standard speeches.

Temporary motivation that fades by Monday.

One-dimensional focus.

Natalie N. Freeman



30-Year Financial Strategist & CEPA®.



Master Storyteller Academy Graduate blending vulnerable narrative with hard data.



Tangible frameworks (Tax, Valuation, Mindset) for enduring behavioral change.



Bridges the gap between personal holistic wellness and enterprise-level profitability.



YOUR Advisor for MAXIMUM Impact.

Book Natalie for your next speaking engagement,
executive workshop, or business consultation.

 @freedomfinancial.consulting  Phone: (813)324-9363

 Podcast: Successful But Single (Available on Apple Podcasts)

 Firm: Freedom Financial Consulting / Edward Jones - Tampa Bay

Professional references and customized keynote proposals available upon request.

