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Courtney Horn, AMPA™

Advisor & Managing Director

With more than 20 years of experience in the financial industry, Courtney Horn, AMPA™ has spent her career empowering her clients. She is passionate about working with clients to help them prepare for the future. Her philosophy is to listen to individual client needs, analyze their unique situations, and transform their goals into a clear and actionable plan.

As an Accredited Portfolio Management Advisor™, Courtney makes recommendations that support her clients' short-term and long-term financial goals by looking at the whole picture, not just investments. She works closely with clients to develop customized strategies that incorporate asset allocation and retirement planning strategies.

Courtney believes a financial plan is an evolving vision that requires consistent review and communication. She conducts regular meetings with clients to review performance, reconfirm financial goals, and adjust as needed.

Courtney was named to the list of "Working Mother Top Wealth Advisor Moms" published by Working Mother Magazine as well as the 2022 and AdvisorHub 25 Women Advisors to Watch list. She has also been honored as a Forbes Best-In-State Women Wealth Advisors (2022-2023), Forbes Best-In-State Wealth Management Teams (2023), Forbes Best-In-State Wealth Advisor (2022-2023), and a Forbes Magazine Top Women Wealth Advisor (2021). Courtney has received the Women's Choice Award for Financial Advisors from 2014-2022. She has also been quoted in the Wall Street Journal and ThinkAdvisor.com.

Courtney is currently the President of Local Animal Charities of America. She was a board member of City Youth Now, an organization that supports youth in San Francisco foster care and juvenile justice systems.