

WOMEN A FORCE IN BUSINESS

NOVEMBER 16, 2021 > RALEIGH CONVENTION CENTER WITH VIRTUAL OPTION

Allison Berger
Financial Advisor and Partner
Financial Symmetry



As an experienced Financial Advisor and partner, Allison builds custom financial solutions to enhance today and enrich tomorrow in the lives of her clients. Allison has a particular interest in working with clients in or on the cusp of retirement who want to delegate their portfolio management so they can enjoy life. She has extensive experience working with the retirement and employee benefits packages of local universities and companies in Research Triangle Park.

In addition to working with clients, Allison is also passionate about financial education and empowering women in finance. She has volunteered with many financial education initiatives including:

- NAPFA's South Region Board
- Serving as a [WIN Advocate](#) for the [CFP® Board](#)
- [SavvyLadies](#)
- NAPFA and Kiplinger's "Maximize your Money" Events
- [Building Homes for Heroes](#)

You will hear her as a guest contributor on the Financial Symmetry podcast, offering specialized financial planning advice for women. She also enjoys writing blog posts that address complex financial topics in a relatable way, often infusing humor and relating financial situations to her favorite sitcoms:

- [Stop the Show](#)
- [Investing, Not Gambling](#)
- [Capital One Data Breach](#)
- [Are you a Spite Spender?](#)

Allison grew up in Charlotte, NC before attending NC State University. She credits her parents for instilling her with a strong work ethic and modeling responsible spending habits. She and her husband Jason have two sons, Ryan and Sebastian. Her other interests include health and fitness, traveling, and soccer. A lifelong soccer player, Allison is a "Soccer Mom" in every sense of the word, continuing to play in Triangle adult leagues and shuttling her kids to practices and games on evenings and weekends.