

**Susan J. Campbell, CDFA™, CFP®
Buena Vista Financial Resources**

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<http://www.BVFinancialResources.com>

Professional Designations and Affiliations

- Certified Divorce Financial Analyst, CDFA™
- Certified Financial Planner, CFP®
- Financial Planning Association
- Institute for Divorce Financial Analysts
- Collaborative Council of the Redwood Empire
- Collaborative Practice San Francisco, Treasurer
- Collaborative Practice East Bay
- International Academy of Collaborative Professionals
- California Divorce Planners Network, Registrar
- Bar Association of San Francisco, Associate member
- NASD Series 7, 63, 65, 24 licensed

Education and Training

- B.S., Business Administration, San Diego State University
- M.S., Business with Financial Services Concentration, San Diego State University
- College for Financial Planning, CFP designation
- Institute for Divorce Financial Analysts, CDFA designation
- Professional Mediation Associates
- Collaborative Interdisciplinary Team Training
- Ongoing through IACP, Collaborative Practice groups, CPA Society, Bar Association, FPA

Professional Experience

- Buena Vista Financial Resources, 2006 – Present
Principal; fee-only financial planning services, specializing in divorce
- Charles Schwab & Co., 1995 – 2006
Director; various roles and responsibilities including field and investment advisor training, product development and management, marketing for corporate affiliation programs
- Merrill Lynch, 1992 – 1995
Financial Consultant; financial planning and investment management for individuals and small business retirement plans
- Antonini Professional Corporation, 1989 – 1992
Manager; financial planning for high net worth clients, personal bookkeeping, tax return preparation for individuals and trusts

Presentations

- National Association of Personal Financial Advisors (NAPFA) Study Group – How a Certified Divorce Financial Analyst Can Help Determine and Equitable Settlement and Avoid Divorce Horror Stories
- California Society of CPAs, San Francisco Chapter – How to Determine an Equitable Divorce Settlement and Family Law Update, joint presentation with Julia Ten Eyck, Esq.
- Divorce Support Group, San Francisco – Financial Basics of Divorce
- California Association of Legal Document Assistants – Financial Planning Services as Related to Dissolution of Marriage
- KRON News – guest on Rob Black's financial segment
- KWMM radio – guest speaker on finance and divorce