

Juli McNeely

LUTCF, CFP, CLU

Biography



Juli obtained a Bachelor of Science degree in Marketing from Northwestern College in Roseville, MN but never found the public relations and advertising job she wanted. Instead, Juli worked in the banking industry for five years, but this also proved to be a stepping stone due to the lack of flexibility and freedom. Working harder, putting in more hours, and just doing extra did not imply an increase in income that week or month. Corporate barricades like these drove Juli to pursue a career path in financial services.

Juli grew up around the insurance and financial services industry with a mother and father who both served clients, and in 1996 Juli joined McNeely Financial Services, an independent agency founded in 1974 by her father Stephen McNeely, who is now retired. Juli holds the Series 7 and 63 securities licenses through Woodbury Financial Services. Juli currently owns and operates the Wisconsin-based firm while growing her personal coaching practice, Juli McNeely Consulting LLC, and she has recently started a new venture with a colleague called Legacy Footprint in an effort to get American consumers more organized financially.

When Juli began her official involvement with NAIFA in 2003 as a trustee on the national board, in the organization's 123-year history at the time, only a handful of women had been trustees. To reach the top of the 40,000-member group, Juli focused on working hard and acknowledging her strengths. In 2011, Juli was the recipient of the NAIFA Wisconsin A. Jack Nussbaum Distinguished Service Award, and she was elected the first ever female president in 2014/2015. In 2013, Juli was named one of the "Top 20 Women You Need to Know" in insurance by LifeHealthPro. In 2015, she was awarded the WIFS Woman of the Year award. In 2016, Juli released her first book called *No Necktie Needed: A Woman's Guide to Success in Financial Services* with the goal of attracting more women to choose financial services for their career and encouraging the women already in the industry to reach ever greater success.

Today, Juli calls on her past experiences to give back to the professional services industries by coaching women and men who have at least a few years of experience and a bottomless drive to take the next step. Juli is passionate about empowering individuals who seek control over their life through a balance with their career. She is interested in collaborating to develop systems and processes for your business that make success more predictable. Her individual coaching and group training features her fun, candid style while delivering the professional knowledge needed to grow your practice so it can truly help people.



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