



Jessica Willis, Founder & CEO - Jessica Willis has spent nearly 20 years of her career in the investment and finance industries and has obtained the Certified Financial Planner (CFP®) and Certified Private Wealth Advisor (CPWA®) designations. Jessica has an MBA from Loyola University Chicago, Quinlan School of Business and her undergraduate degree from University of Michigan. Jessica has a passion for serving clients, getting messy financial plans in order and a love of smart fintech tools that improve efficiency and accessibility.

Jessica's journey in building Pocketnest began as she was faced repeatedly with the gap that existed in her industry. Her friends and family were left without access to trustworthy and independent financial advice; and it wasn't simply because they could not afford it, it was because the industry hasn't adapted to the next generation of consumer. Her millennial clients, friends and family were frustrated by the lack of "do-it-yourself" financial tools and digital alternatives. Friends often shared stories about being told by the very professionals eager to serve them, that until they reached account minimums of \$1M and above, they didn't qualify for traditional wealth management services.

Jessica grew up with a love of organizing her finances (although at the time, she simply enjoyed having access to her own lockable bright pink cash-box at age 8). As a child, Jessica was constantly in awe of the financial decisions her parents made, including basic economic principles like how a dollar can be valued at something besides a dollar when compared to foreign currencies, a challenging conversation between Jessica and her parents at age 9. Jessica's dad, a lifelong entrepreneur spoke openly about the importance of saving for retirement and savings goals, and working hard for the purpose of having financial flexibility later in life. Lessons Jessica grew up with became second nature to her, and now she wants to share this education with others.

Jessica spends her time "off the clock" with her husband of 15 years, Tom, and their three children (and yes, Jessica enjoys teaching her kids the importance of having short term and long term savings goals and charitable goals through their *Money Jars*)

