

Biography



Kelly Woo, CFP®, EA

“Coming together is a beginning; keeping together is progress; working together is success.” –Henry Ford

Kelly Woo is the founder and principal of Bene Financial and Bene Wealth Management Company. She is a Certified Financial Planner® and Enrolled Agent, and her belief in the power of collaboration has led to significant achievements in her career. She has been a member of the International Association for Financial Professionals' "Million Dollar Round Table" for over 10 years and has consistently demonstrated her commitment to excellence. She is also a TOT (Top the Table MDRT) member, which is the highest-ranked accolade that demonstrates her exceptional performance. In 2019, she was one of the distinguished speakers at the MDRT Global Conference in Sydney, Australia, and was recognized as one of the CalCPA Women to Watch Award winners, further underscoring her industry leadership.

Kelly presented tax-saving strategies for high-income business owners at two local CalCPA chapters in 2018 and presented similar financial topics to other financial services professionals in the industry through the National Association of Insurance and Financial Advisors (NAIFA) in 2019. She understands the complexity of financial planning and believes in creating strategic partnerships with other experts in the industry, such as attorneys, CPAs, and risk management advisors, to provide a more comprehensive solution not only for her clients but also for those of other financial professionals.

Kelly is an expert in advanced pension planning, wealth management, and insurance planning for both business owners and individuals. She focuses on providing tax-saving strategies and wealth management to high-net-worth business owners and retirees. Kelly believes in creating a diversified asset portfolio that minimizes risks and maximizes returns for her clients. The Bene Financial tagline "Do Good. Do Well" reflects her goal of using her talent and experience in financial services to benefit others while doing well. She guides her clients through each step of the financial planning process with a genuine desire to provide the best experience and results.

Kelly enjoys giving back to the industry by appearing on television shows, radio shows, newspapers, journal publications, and webinars, making efforts to educate and instill awareness about the changes within the industry. She was a long-time columnist with The Korea Times, writing monthly on financially related topics for business owners and high-net-worth individuals. Kelly is focused on empowering her clients and other financial professionals by sharing her financial knowledge.

Kelly is also a strong advocate of charity work. She motivates and aids her clients in establishing their own private charitable foundations and legacies and engaging in volunteering activities for the betterment of the community. She is happily married with three wonderful sons and resides in the larger Los Angeles region.

