

Donna Cates of Money Matters Wealth Solutions to be Featured on Close Up Radio

LEEDS, ALABAMA, UNITED STATES, March 13, 2024 /EINPresswire.com/ -- "I want to help women make smart decisions about their money," declares our guest. She also notes that over two decades ago, only seven percent of financial planners were women. Currently eighteen percent of financial advisors are women. Our guest contributes to that improving statistic. This is the story of Donna Cates.

Donna Cates is a financial strategist and owner of Money Matters Wealth Solutions. "What makes my practice unique is that I work primarily with women to help them make smart decisions about their money," notes Donna. In addition to traditional financial planning, she also offers financial planning specifically for divorcing couples, workshops related to finance and divorce, and operates an additional business focusing on financial-related divorce mediation.



"Those who know me, know that my mantra is that a man is NOT a financial plan," she asserts.

"I offer comprehensive financial planning, investment management, and protection planning" explains Donna. "When a prospective client comes to me, we begin the process by engaging in financial planning where we define what their current financial situation is. Once we know where they are, we discuss what's important to them, about their money and what they want to achieve. Then I can map out a strategy and implement it that will allow them to get where they want to be."

"Our clients value that I don't use financial jargon and avoid talking down to anyone," adds Donna. "I work closely with them to understand their financial situation clearly while

approaching their financial journey with empathy, recognizing, and respecting the emotions involved.”

“Many people don’t think they have enough money or wealth to work with a financial advisor,” she emphasizes, “The reality is that you can’t afford NOT to work with a financial advisor. The goal should be to help the individual start from where they are, and build.”

“In addition to regular financial planning, I also do divorce financial planning as a Certified Divorce Financial Analyst (CDFA),” explains Donna. “I offer a workshop to women who are either going through or considering divorce. The workshop is held monthly, and we discuss the emotional, legal, and financial aspects of divorce. During this workshop, I focus on empowering women by addressing the financial aspects of divorce. As a CDFA, I guide them through the necessary financial data required by attorneys, discussing common financial pitfalls and mistakes to avoid. The goal is to have them actively engage with us, enabling us to support them throughout the entire divorce process. Ideally, they hire me for divorce financial analysis prior to working with an attorney, and I also receive referrals from attorneys for the financial component of their cases.”

“We want women to understand the short-term and long-term financial impact of their divorce settlements, before they sign the decree,” summarizes Donna.

In addition to her role in divorce financial planning, Donna also provides financial divorce mediation through her service called Navigating Divorce. This service is for couples seeking to

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reduce divorce expenses. Donna acts as a mediator for couples who only need to address financial matters in their divorce, especially in cases without young children. She assists them in making decisions on how to navigate their divorce proceedings related to finances.

“In school, I studied management and psychology,” recalls Donna. “I first found work for the Army as a manpower analyst and as a budget analyst. I then changed careers and got into a sales position. Because I am an outgoing person with strong leadership skills, a gentleman approached me at a networking event. He was a financial advisor and asked if I would consider that field. After some research, I found



that there was a true need for more women financial advisors. That is how I got into the business. I have been doing this for twenty-four years, and only recently in November of 2022, did I start Money Matters Wealth Solutions. I am proud of the decision to embark in this business on my own. It took a lot of courage.”

“I have been divorced,” discloses Donna, “But I have been happily and successfully married for twenty-nine years.”

Donna has much lined up for the future. She describes her firm, Money Matters Wealth Solutions, as a boutique operation offering a concierge style service. Additionally, Donna plans to grow her mediation business Navigating Divorce. Currently, it is a side gig that she seeks to expand. She also participates in a group called Divorce Divas, that was started a few years ago. It is a community of women that work in the divorce field. It goes beyond divorce attorneys and divorce financial planners. It includes all different types of specialists that we need because of divorce.

“We are smart women,” concludes Donna. “We run households. We raise families. We run businesses. We have got to stop sticking our head in the sand when it comes to money. The reason being that we are likely to be on our own at some point regardless of whether it’s by choice or not. It’s time to pull up your big girl britches and get smart and educated about your money situation.”

Close Up Radio will feature Donna Cates in an interview with Jim Masters on Friday March 15th at

1pm Eastern / 12pm Central

Listen to the show on [BlogTalkRadio](#)

If you have any questions for our guest, please call (347) 996-3389

For more information about Money Matters, please visit

<https://www.moneymatterswealth.com/>

For more information about the Divorce Workshops and to register, please visit

<https://www.moneymatterswealth.com/workshops>

For more information about Navigating Divorce, please visit <https://www.navigating-divorce.com/>

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