

Barbara Treadwell Certified Financial Planner Recently Featured on Close Up Radio

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For over four decades, Barbara Treadwell, a seasoned highly credentialed Certified Financial Planner, has had a successful career helping hundreds of individuals create financial plan, tailored specifically to who we are, allowing us to save money, afford the things we want, while setting us up for long term success.

Committed wholeheartedly to educating her clients, Barbara knows our relationship with money has a significant impact on our lives and in order to be truly happy we must be financially stable.

As a recognized expert in her field.

Barbara's services include Cash Flow Evaluation, Education Planning, Insurance Planning & Risk Management, Estate Planning, Special Needs Planning, and Retirement.

Before launching her Certified Financial planning business, Barbara's journey was full of challenges where she had to overcome many hardships and setbacks. For fifteen years, she initially worked as a therapist and during that time she not only realized how empathy was an enormously powerful asset in working with people, but that so many were floundering under the weight of the world. This drove her to seek other avenues to help people both personally and professionally. Recognizing these hurdles, in her late thirties, Barbara nonetheless pivoted in her career seeking new ways to share her visionary approach to personal growth and transformation. She herself was struggling with insecurities plagued by self-doubt, but an indomitable spirit and fiery determination. Under the guidance of great mentors, Barbara found her calling that aligned her with her true purpose and she launched her own business aimed at transforming and enriching the lives of all her clients.



Today, poised for continued success, Barbara stands as a distinguished figure of personal development, more enthusiastic than ever to assist her clients with a time-honored wisdom that is uniquely her own.

She firmly believes that cultivating enduring partnerships is essential. That includes actively listening and making certain her clients are heard.

Moreover, Barbara wants her clients to create a personal legacy that they can leave behind for those who have mattered most to them during their lifetime. To cultivate a life rich to who they are at their very core. And she wants her clients to kick-start their retirement.

The longer we live, and people are living longer than ever before, a substantial sum for living comfortably in our golden years urgently matters.

That means saving more and planning for longer and the earlier we begin, the better our chances are for having enough retirement funds to last our entire lifespan.

With a multipronged approach, Barbara empowers clients with tools and knowledge, reassess their current lifestyle, then helps them develop a budget that aligns with their financial goals and priorities.

Barbara's clients are assured she not only protects their financial interests, but genuinely cares about their personal well-being.

With her dazzling smile, she is a picture-perfect example of prioritizing self-care that she generously extends to others. It's not unusual to find her chatting in her client's homes about long term planning. She offers a variety of proven strategies that goes far beyond numbers, understands her clients' stories, and provides insights into more than just their financial statements.

In her podcast she discusses from earlier life's trials and tribulations, how Estate planning launched her career, and how to tackle our money problems. She discusses how working with families is especially near and dear to heart and sustaining wealth for generations to come.



With her warm, practical, skillful, down-to-earth, yet straight-talk approach Barbara is a pro at what she does. Working with her is a game changer because her client begins to start saving, living, and being their very best.

Close Up Radio recently featured Barbara Treadwell in a two-part interview with Jim Masters on Tuesday October 7th at 11am Eastern, and with Doug Llewelyn on Tuesday October 28th at 11am Eastern

[Listen to the Podcast](#)

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For more information, visit: www.barbaratreadwell.com

Written By: Beatrice Maria Centeno

Lou Ceparano

Close Up Television & Radio

+1 631-850-3314

[email us here](#)

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