Influential Women Highlights Sara Altom, M.Ed, For Advancing Retirement Planning And Client-Focused Financial Strategies

NORTH RICHLAND HILLS, TX, UNITED STATES, July 2, 2026 /EINPresswire.com/ -- Dallas-Based Insurance Broker Combines Education, Communications, and Financial Expertise to Help Clients Age 65+ Achieve Stability, Protection, and Lifetime Income Security

Sara Altom, M.Ed, is an accomplished insurance broker with Equitable Advisors in Dallas, Texas, specializing in retirement planning, health insurance, and financial solutions for clients aged 65 and older. Sara is dedicated to helping individuals achieve financial stability, security, and comfort throughout retirement by offering honest guidance, personalized planning strategies, and a client-first approach rooted in trust and transparency.

As an independent broker, Sara manages her own schedule and works closely with clients in both office and home settings. Her services include reviewing retirement funds, ensuring appropriate life insurance coverage, and designing customized income strategies intended to provide lifetime financial support. She focuses on simplifying complex financial decisions so clients can make informed choices with clarity and confidence.

Sara often describes her professional journey as having lived nine distinct career paths, each contributing to the depth of knowledge she brings to her current role. She began her academic path with a Bachelor's degree in English and Technical Editing from the University of North Texas, launching her career in publishing through an internship at a literary agency in New York City. She later worked with a non-fiction publisher in Dallas, developing strong editorial and analytical skills.

Her career then transitioned into nonprofit communications, where she managed social media platforms and worked as a ghostwriter for five years. Following a significant life change as a single mother, Sara shifted into education, teaching English for seven years in order to align her professional responsibilities with her family priorities. This period strengthened her communication abilities and deepened her commitment to service-oriented work.

Encouraged by a long-time friend in the retirement planning industry, Sara later entered financial services with Equitable Advisors in a fully commission-based role. In her first year, she was named Rookie of the Year among approximately 10,000 agents nationwide, an achievement she credits to consistency, integrity, and a focus on doing what was best for her clients rather than pursuing sales goals.

She is now preparing to expand her professional credentials by joining Equitable Financial Advisors and pursuing securities licenses, to combine her educational background and financial expertise to better serve teachers and other professionals in retirement planning.

Sara holds a Master's Degree in Educational Leadership and Policy from The University of Texas at Arlington, in addition to her Undergraduate Degree from the University of North Texas. Her diverse background across publishing, communications, education, and financial services enables her to translate complex financial concepts into clear, practical guidance for clients navigating retirement decisions.

Sara attributes her success to early experiences that shaped her understanding of financial responsibility and client protection. A pivotal moment came when she evaluated financial products affecting her parents and recognized that they had been placed in unsuitable arrangements. That experience led her to question industry practices and strengthened her commitment to ensuring clients are matched with appropriate financial solutions tailored to their needs.

An opportunity to enter retirement planning later emerged through a close friend of 17 years, who also became her supervisor at AmeriLife. Their longstanding relationship provided a foundation of trust, encouraging Sara to transition into the field with confidence and purpose.

During her early success in the industry, Sara learned the importance of transparency and accountability in building client trust. Even when challenges or mistakes occurred, she found that honest communication helped preserve relationships and strengthen credibility. She also credits her success to a strong support system that includes family, colleagues, and mentors, particularly women who have supported her throughout her career journey.

Her professional background spans corporate, nonprofit, and public-sector environments, including experience within school systems. These varied roles helped Sara develop adaptability and resilience, which she describes as being shaped by what she calls the "school of hard knocks." This experience reinforced the importance of maintaining a strong support network while navigating complex professional environments.

As a woman in sales, Sara maintains a disciplined and competitive mindset, emphasizing preparation, communication, and execution as essential components of success in a performance-driven industry.

One of the most influential pieces of career advice Sara has received is to “bet on yourself.” This guidance came during her transition from education into a commission-based financial services role and served as a turning point in her professional trajectory. The advice encouraged her to step away from the stability of a fixed salary and enter a field where success is directly tied to effort and results.

Sara credits this decision as a defining moment in her career and continues to build her practice with a long-term focus on retirement planning and financial advising. She believes that trusting one’s abilities and committing fully to professional goals are essential for sustained success.

Her values remain centered on integrity, honesty, and dedication. In every client interaction, Sara prioritizes empathy and a commitment to doing what is right, ensuring that financial decisions are guided by the client’s best interests rather than product-driven outcomes.

Outside of her professional work, Sara values continuous learning and personal growth. She enjoys reading thrillers, expanding her personal book collection, and maintaining intellectual curiosity. She also enjoys golf and spending time with family, particularly at her parents’ condo in Panama City Beach, Florida, a place she considers personally meaningful.

Through her work in retirement planning, Sara Altom continues to help clients build secure financial futures while combining her diverse background in education, communications, and finance. Her career reflects a commitment to service, adaptability, and empowering others to make informed financial decisions with confidence.

Learn More about Sara Altom:

Through her Influential Women profile, https://influentialwomen.com/connect/Sara-Altom

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