



Sophia Bera, CFP®

Founder, Gen Y Planning

Sophia Bera, CFP® is not your father's financial planner. After working in traditional financial planning firms since 2007 she quit her job at a NY start-up to launch her own firm, Gen Y Planning in 2013 to serve clients in their 20s, 30s, and 40s.

Sophia has been quoted in the New York Times, Wall Street Journal, Forbes, Fortune, Business Insider, LifeHacker, and more. If you Google "financial planner for Gen Y" she's at the top of the list. In the last 18 months, Sophia has fallen in love, gotten married, had a baby, and bought a home in Austin, Texas where she lives with her husband, Bryan, and their son, Theo.

Website and Social Media:

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