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Xiaoping "Josie" Jiang, CPA, CFP®, ChFC® of LifeTime Asset & Tax Management Appointed as Diversity & Inclusion Director with FPA of the Triangle

RALEIGH, NC (OCTOBER 11, 2023) A new passion has emerged for Xiaoping "Josie" Jiang, one with a personal meaning. Josie was recently appointed as the Diversity & Inclusion Director with the Financial Planning Association (FPA) of the Triangle, a relatively newly created position within this local chapter. In this role, her goal is to advocate for and promote diversity, equality and inclusion in the financial planning industry and the community it serves.

What inspired Josie to set such a lofty goal? It starts with her background. Josie is originally from Zhejiang, a birthplace of ancient Chinese civilization along the southeast coastal province in China. She relocated to the United States to pursue higher education on an international student visa. She earned her Bachelor of Science degree in Accounting with the Highest Distinction from Purdue University and went on to attain a Master's degree in Accounting, with a specialty in taxation, from the University of Georgia. Josie earned her CPA designation in 2008.

Josie joined the LifeTime Asset & Tax Management team in January 2022. Already holding her CERTIFIED FINANCIAL PLANNER™ registration, earned in December 2021, and now working for a dual wealth management and tax services firm, Josie's interest in the financial planning side of the business quickly grew. She most recently earned the Chartered Financial Consultant® credential.

LifeTime Asset & Tax Management supports individual and professional growth with its team members. In May 2023, Josie graduated from Athena of the Triangle's Emerging Leaders program. During this 8-month interactive workshop, she learned about the Eight Principals of Enlightened Leadership. Josie and other women explored the qualities of a leader and how to incorporate these eight principals into both their careers and personal lives.

This program was a transformative experience for Josie. It empowered her to embrace her true self and take bold actions to drive change, advocating for a more inclusive culture. This was the driving force behind her becoming the Diversity & Inclusion Director with FPA of the Triangle.

"Having experienced the challenges and barriers that immigrants often face when navigating the financial system in a new country, I deeply understand the importance of representation and inclusivity in the financial planning profession." said Xiaoping "Josie" Jiang, Tax Manager with LifeTime Asset & Tax Management. "Being the only Asian and new immigrant at the Financial Planning Association (FPA) meeting in May 2023 highlighted the need for greater diversity within the profession. After careful consideration and meaningful discussions with a few FPA board members, I decided to take on the Diversity and Inclusion Director role."

Matt Glova, CFP®, CEO of LifeTime Asset Management commented, "We are extremely proud of Josie's initiative to take on such a socially responsible role within our local FPA chapter. Her personal experiences and the challenges she's faced within this industry has ignited this passion and her desire to make a difference. LifeTime is thrilled to have been a part of that motivation, supporting her involvement with Athena of the Triangle's Emerging Leaders program."

We look forward to seeing all that Josie will accomplish in the Diversity and Inclusion Director role in the coming months and years.

About LifeTime Asset & Tax Management

LifeTime Asset & Tax Management brings together two important pieces of your financial life — financial planning and tax planning. LifeTime Asset helps clients by simplifying wealth management and investment complexities, aggregating every aspect of their finances and clarifying their goals and choices. LifeTime's Wealth Consultants are CERTIFIED FINANCIAL PLANNER™ professionals, having met the highest educational standard in the financial planning industry. LifeTime currently includes 12 CFP® practitioners and 90 years of combined experience in the financial field. The firm is also backed by an independent broker/dealer, Commonwealth Financial Network®, meaning they are independent — LifeTime Asset's Wealth Consultants are free to act solely in clients' best interest, objectively, without pressure to promote a certain product or strategy. LifeTime added a tax department to the firm in 2020. Our tax team provides tax return preparation and bookkeeping services. Our asset and tax management teams work together to provide comprehensive financial services. Learn more at www.lifetimeasset.com.

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