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Mark Zoril: Hey there, it's Mark Zoril with the PlanVision podcast. Now we're doing one of those podcasts again where we're delighted to introduce a new staff person with PlanVision. I'm here with Lakshmi Raguna and she has just started with us. And so we'll get to know her a little bit. Hi Lakshmi, how are you?

Lakshmi Raguna: Hi Mark, I'm doing very well.

Mark Zoril: So can you tell us a little bit about your background, your work background before coming to PlanVision?

Lakshmi Raguna: Sure. I've worked in the tech industry for almost 20 years. My last job, I was, I worked as a product manager building out cybersecurity products. And that has been my domain throughout the entire part of my career, cybersecurity products. And that's what I have, I was doing before I joined PlanVision.

Mark Zoril: Okay, well this is kind of a big change, right?

Lakshmi Raguna: Yes, it is a big change, but also a natural progression.

Mark Zoril: So Lakshmi, what kind of work will you be doing with PlanVision?

Lakshmi Raguna: I think initially, um, my main goal is to help PlanVision staff with their financial tools and processes, like eMoney, Interactive Brokers. So once the client interviews are done, we kind of have a good picture of the client's financial background. Uh, and then with time, also I would be helping with the financial planning and tax planning process.

Mark Zoril: So Lakshmi, what are you looking forward to about this change in your career and the work that you're going to be doing?

Lakshmi Raguna: You know, I've heard a lot of good things about PlanVision. I read about you in the Reddit forums, Bogleheads, and I like the model with which you work with the clients. And I was really excited when I got an offer to join PlanVision. I think this whole motto of putting clients first and their financial future first, and the manner in which you're doing business, excites me about being part of PlanVision.

Mark Zoril: Now, you also mentioned as we were chatting about this that just through some of your own personal experiences as well that you're interested in helping some or or at least what you had was some experience kind of chatting with or getting to know some people that you felt like you could help.

Lakshmi Raguna: Absolutely. So I started my, uh, certified financial planner course last year. One of the main motivations was for me to kind of gain more financial knowledge. I had seen some of my friends go through very difficult life transitions in their 40s. Unfortunately, they became single moms, and then, you know, they were ill-equipped to handle their financial future, right? And that placed them in a bad situation. And I kind of felt motivated to help them and also educate myself more thoroughly on financial knowledge.

Mark Zoril: Well that's awesome. And I'm glad that we were able to connect. We're delighted to have you come on board. Thanks Lakshmi.

Lakshmi Raguna: Thanks so much, Mark.

Thank you for listening to the PlanVision podcast. Let us know if you have any questions or comments on the topics covered.