Transcript: PlanVision-Podcast-2026-Allan-Leung-Interview.mp3

[Intro]

Welcome to the PlanVision podcast, where we share simple, straightforward investment and planning ideas for normal people. The description in this podcast is for informational purposes only. Do not construe this as personal tax, financial, or legal advice for your situation.

[Mark]

Hey there, it's Mark back with another edition of the PlanVision podcast. And this is another new employee addition as we're growing here at PlanVision. I have Allan Leung with us and so we're going to get to know him a little bit better. How are you today Allan?

[Allan]

I'm doing well, thank you for inviting me. I'm looking forward to joining the the PlanVision team.

[Mark]

Great. Can you tell us a little bit about your background, what you had been doing professionally before you came to PlanVision?

[Allan]

Yeah, before coming to PlanVision, I was working in the corporate world, working on financial strategy and budgeting and brand management initiatives for major companies, you know, such as Walmart, Proctor and Gamble, Bayer Healthcare, and SiriusXM bedding. And there I was working a lot with my business partners, you know, developing business plans, developing budgeting, tracking performance. And I see a lot of those same skills being applied to helping families and individuals meet their financial goals.

[Mark]

Yeah, and so you are a CFP candidate. You're really close to becoming a CFP, right. Can you tell us a little bit about where you're at on that path?

[Allan]

Yes, I am. And I'm excited. I've progressed pretty far along. As you might be aware the, earning the credential is pretty vigorous. You know, we have to pass a six hour exam which I've done already and have 6,000 experience hours. And I'm pretty close, about 200 hours short of achieving that the experience hours necessary to, um, earn my credentials.

[Mark]

And I think we're targeting around September, sometime in September for, for that, right?

[Allan]

Yes, that is right. I expect to have my credentials by September.

[Mark]

Well that's great Allan. And so what are you looking forward to about the work that we're doing here?

[Allan]

One of the things I'm looking forward to is just helping clients achieve their life goals whatever that might be through prudent financial planning. As you know, there's no perfect plan, there are just options. And so helping clients understand their options so they can make prudent, well informed decisions to achieve the goals in life whatever that might be. And I know it's individualized and so I'm excited to help each person achieve their own individual goals.

[Mark]

Well that's great Allan. We are pumped that you're here and working with our clients on an individual financial planning basis. But also you'll be helping Jason as we grow some of the work that we're doing on the tax side as well. Thanks a lot.

[Allan]

Well thank you for having me on the podcast today, Mark.

[Outro]

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