



Meet Our Team



Trina Brown, CFP®

What childhood experiences shaped the person you are today?

I grew up in a working-poor household where we always had enough to eat, but there wasn't money for much of anything else. At one time, our 1977 International Harvester Scout was in such bad shape that there were holes in the floor and the heat didn't work, so in the winter we would sit in the back seat huddled under old sleeping bags watching the road go by below us.

Although it wasn't easy to make do with so little, I am grateful for what I learned from growing up in that environment.

Self-reliance – we grew a large vegetable garden every year and canned and froze food for winter, as well as making our own jam, spaghetti sauce, and apple sauce.

The importance of community – when we or members of our extended family needed a new roof or other work done on our houses, we all helped each other. Some of my best memories are of painting other people's homes, joining other families to cut wood for the wood stove, or making jam together.

Making your own fun – one year our TV broke (we only got two channels to begin with), and my sisters and I had to go all summer without a TV. It was the best summer ever – we spent the entire summer outside playing in the creek and the woods next to our house during the day and in the evening we read books together and crocheted.

The security of saving and financial stability – most importantly, I learned how vital it was to save for emergencies and plan for the financial future so that I would never have to feel that desperation again.

Who is one of your heroes and why?

I have always found my grandmother an inspiration. She was the youngest of 11 children in an Amish family and grew up during the Great Depression. Her mother died when she was just 10 years old, and she was taken out of school and made to work as a domestic servant. She never got over being forced to quit school at such a young age, and education was very important to her. She worked as a nurse's aid and on a factory assembly line while raising nine children.

She taught me to value what's really important: kindness, education, enjoying the everyday pleasures of nature and family, and living according to your values.

What is something interesting about you that would surprise someone?

I have three master's degrees and spent almost 20 years working in the IT field.

What book are you currently reading?

Facilitating Financial Health: Tools for Financial Planners, Coaches, and Therapists. I love to learn new things, and I'm especially interested in behavioral finance.

How do you like to spend time outside of the office?

I enjoy spending time with my family, gardening, playing with my dogs and cats, reading, knitting, and traveling.

What causes or community organizations are important to you?

I was a Girl Scout Leader for several years. Empowering women and girls is very important to me.

Why did you choose financial planning as your profession?

When I worked in the IT field, many of my colleagues made good money but didn't have anything to show for it besides Coach purses and car payments. I enjoyed IT work, but I wanted to help people, and personal finance is my passion. I saw what a huge difference financial security made in my life, and I realized it was time to follow my passion for helping others with their finances.

What is one piece of financial advice you offer clients?

Always pay yourself first. If you put your saving and investing on autopilot, you'll never have to think about it, and you'll be surprised how quickly your money will grow.

What do you think are the most important steps people can take to improve their financial well-being?

Spend some time envisioning the life you want to lead and identifying what's really important to you, then make sure your financial choices are supporting your goals and your values. For example, if you long to be a world traveler, but you find yourself frittering away all of your money in mindless spending, make a conscious decision to save up for your adventures.

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