

**Jesse (Duong) Vu BSW, EPC, CHS, QAFP
CEO – Exceedia Consulting Ltd.**

As the principal advisor in Exceedia's family division, Jesse's practice focuses primarily on helping middle-income families get organized, find money, and learn how to make better financial decisions. One of her passion projects is helping families access the disability tax credit – something so many people have struggled to apply for. Jesse spends time getting to understand your way of thinking about money, exchanging ideas, and making course corrections.

A meeting with her is always thought-provoking and interesting as she helps you uncover how your financial personality impacts your financial decision-making. What makes Jesse's approach unique is her patience and skill in working with people who are starting out, starting over, or just overwhelmed with the idea of finances.

People are busy. Jesse's clients take comfort in knowing someone has a full picture of their financial life and a good understanding of what is important to them. A strong believer that true financial planning requires a trusting relationship, many of Jesse's clients have been to her home and met her children.

Most client appointments with Jesse finish with a big hug and it is not unusual for clients to shed a tear or two during emotional meetings.