

Cindy Sforza, CFP® , CRPC®

President and Founder

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From the time she can remember, Cindy has always been interested in hearing people's stories and helping them find solutions. Providing comprehensive financial advice and investment management to clients since 2007, Cindy thrives when she is helping people identify their financial goals and creating strategies for them to succeed.



Cindy has been a CERTIFIED FINANCIAL PLANNER™ professional since 2016, and also holds the Chartered Retirement Planning CounselorSM designation. A recipient of multiple financial industry awards for achievement and service, Cindy previously enjoyed being an Instructor of Financial Planning at the University of California, Irvine, where she taught CFP® exam coursework to students pursuing their CFP® designation. She is an active member of the Financial Planning Association, Orange County Chapter. Cindy earned her bachelor's degree from the University of California, Los Angeles.

A native of Southern California, Cindy is an avid dog lover and spends time volunteering with her local rescue organization to help dogs find their forever homes. A maker at heart, Cindy enjoys crafting stained glass, baking sourdough bread from scratch, and cooking delicious meals for her friends and family. A lover of travel and exploring local favorites, she also enjoys camping, golfing (badly, but she loves it anyway), and listening to podcasts on long walks with her dog, Lucy.
