

LEAH DENISE WYATT, MSc.

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PROFESSIONAL SUMMARY

Experienced advisor and financial coach transitioning into wealth management after 20+ years guiding individuals, executives, and organizations through consequential decisions and periods of change. Known for listening closely, asking the right questions, building trust, and turning complicated information into practical next steps. Direct experience in financial coaching and individualized financial action planning. Brings a strong record of relationship building, analytical thinking, client education, and follow through, with a growing focus on helping individuals and families build lasting financial security.

CORE COMPETENCIES

Client Relationship Management • Consultative Communication • Active Listening • Relationship & Trust Building • Business Development • Strategic & Analytical Thinking • Complex Information Translation • Client Education & Facilitation • Community & Stakeholder Engagement • Data-Informed Decision-Making • Cross-Functional Collaboration • Performance & Process Improvement • Accountability & Results Orientation • Change & Transition Management • Continuous Learning

TECHNICAL & PROFESSIONAL EXPERIENCE

iLevitate Solutions, LLC

Principal Consultant & Financial Coach | February 2025 – Present

- Conduct client discovery around 5- and 10- year goals, lifestyle priorities, and desired financial outcomes, then assess income, savings, retirement assets, debt, homeownership, and monthly cash flow to identify gaps and establish priorities.
- Develop individualized financial action plans using cashflow analysis, debt payoff projections, emergency fund targets, retirement contribution capacity, and scenario modeling; guided clients to eliminate 50%-100% of their debt while building financial stability and preparing for longer term investing.
- Guided a client through a seven-month financial reset, strategically allocating home-sale proceeds to preserve \$52,000 across savings and future homeownership goals, eliminate \$6,000 in debt, and purchase a \$12,000 vehicle in cash; establishing ongoing capacity to save \$1,100 and contribute \$1,270 toward retirement each month.
- Coach clients through behavioral barriers including lifestyle creep, discretionary spending, family financial obligations, and competing priorities, helping individuals and couples align day-to-day decisions with longer-term financial goals.
- Maintain client relationships through monthly planing sessions and weekly progress check-ins, using active listening, accountability, spending reconciliation, and ongoing plan adjustments to strengthen financial confidence and follow through; practice has grown entirely through client referrals.
- Developed an operational framework to guide \$8M in philanthropic investment, translating a complex climate equity concept into a practical strategy for funding, programming, policy and partnerships.
- Advised clients on complex financial, operational, and strategic decisions, translating analysis into concise presentations, recommendations, and practical next steps for executives and stakeholders.

United States Agency for International Development (USAID)

Senior Strategy Advisor | May 2023 – January 2025

- Advised executive leadership on a five-year strategy guiding the allocation of \$700M in congressionally appropriated funds, facilitating complex decisions across public health, education, and economic growth priorities.
- Led consultations with 80+ stakeholders and facilitated 14 cross-functional workshops, using active listening and structured decision making to surface priorities, reconcile competing perspectives, and build alignment around long-term goals.
- Developed decision criteria that strengthened prioritization, resource allocation and accountability across 16 regions, translating extensive data and stakeholder input into clear recommendations for leadership and government officials.
- Analyzed 20+ federal policies and strategies, translating complex requirements into practical guidance that enabled teams to make informed, compliant decisions.

Task Force for Global Health

Senior Associate Coalition Director | July 2020 – April 2023

- Built and managed a global coalition supported by \$8M in philanthropic funding, developing trusted relationships across organizations and aligning stakeholders around shared priorities.
- Grew the coalition to 1,100+ participants across 85 countries and 350 organizations, creating an engaged network through relationship development, targeted outreach, and ongoing opportunities for collaboration.
- Designed and facilitated learning and stakeholder engagements reaching 2,500+ participants, listening across diverse perspectives and translating insights into practical recommendations and a long-term collaborative strategy.
- Strengthened execution and accountability by establishing operating procedures, performance tracking systems, documentation standards, and work-planning processes that supported consistent delivery and data informed reporting.

United States Agency for International Development (USAID)

Senior Learning Advisor | November 2014 – June 2020

- Identified and helped mitigate eight major risks to a \$400M strategic portfolio by analyzing performance data, identifying emerging financial compliance issues, recommending resource adjustments, and facilitating decisions among senior leaders.
- Built and managed a network of 30 subject matter experts across 15 operating units, strengthening relationships, accelerating information sharing, and connecting colleagues with specialized expertise to solve complex problems.
- Led data informed portfolio reviews and performance assessments, translating findings into recommendations that strengthened operational performance.
- Improved organization-wide processes by developing standardized performance and reporting tools that strengthened consistency, data quality, and follow through across programs.

EDUCATION

Columbia University, New York, NY — Master of Science, Information and Knowledge Strategy

University of Oregon, Eugene, OR — Bachelor of Science, Journalism and Mass Communication
(Public Relations)

ADDITIONAL EXPERIENCE & AFFILIATIONS

Earlier roles in knowledge management, communications, organizational learning, and consulting with the University of North Carolina at Chapel Hill, ConocoPhillips, TriMet, and private-sector clients.

Columbia Alumni Association of the Carolinas • University of Oregon Alumni Association • University of Oregon Black Alumni Association • Zeta Phi Beta Sorority Incorporated • Weaving Futures