

Art De La Rosa Biography

OCCUPATION	Financial Planner, CEO
EDUCATION	BS Business Administration with concentration in Accounting and Finance, University of Southern California (2000)
CERTIFICATION	Real Estate License CA Life Insurance License
AREA OF EXPERTISE	Financial Education and Planning
POSITION RESPONSABILITIES AND DUTIES	Educating individuals through conducting financial seminars and classes, utilizing extensive marketing outreach via LinkedIn and various social media platforms; Interfacing with clients to assist them in developing their personal financial plans, including their plans for retirement
NUMBERS OF YEARS IN POSITION	23
CAREER	Chief Executive Officer, Founder, Wealthy Dollar, Hacienda Heights, CA (2000-Present); Senior Retirement Specialist (Retired), California Public Employees' Retirement System (CalPERS) (2015-2023); Founder, Owner, De La Rosa Financial Planning (2005-Present); With, Bank of America Corporation (Eight Months); Financial Planner, Washington Mutual, Inc. (Three Years); Intern, Financial Planner Assistant
AWARDS	Featured in a newspaper article, where his innovative financial management approach was highlighted (2005); Garnered significant recognition from the California Public Employees' Retirement System (CalPERS) for his innovative approach to teaching financial literacy classes within the organization; Has served as a keynote speaker on multiple occasions at prominent conventions, delivering impactful presentations on financial literacy and management
MEMBERSHIPS	Multiple Listing Services
CIVIC	Participant, Church Activities; Financial Literacy Teacher, Congregations
CREATIVE WORKS	Author, "Wealth Grows When Your Cash Flows," Self-published, DLR Books (2004) Author, "The Power of Prayer," Self-Published, E-Book
AVOCATIONS	Spirituality; Spending time with his loved ones
GENDER	Male
MARITAL STATUS	Married
CHILDREN	Angelica; Alisa
RELIGION	Christian



ATTRIBUTES SUCCESS TO:

Mr. De La Rosa strategically delved into multiple sectors of the financial planning industry, including real estate, insurance, and mortgages, with a deliberate focus on cultivating comprehensive expertise. This strategic approach enhanced his effectiveness in assisting individuals in planning for their retirement. For Mr. De La Rosa, success has always revolved around aiding the average American. While many in the financial industry garner accolades for assisting the affluent or financially endowed, his focus has consistently remained on individuals seeking to enhance their financial standing. Since embarking on his journey as a financial planner, his objective has never been to cater exclusively to clients with substantial wealth. Instead, his mission has been clear: to extend guidance to those with the eagerness to learn and improve their financial circumstances, regardless of their initial resources. Mr. De La Rosa authored a book accessible to all at no cost, and he has produced numerous videos available online, elaborating on his methodology for attaining financial success. This altruistic approach distinguishes him from others in his field, emphasizing his commitment to democratizing financial education and empowering individuals from all walks of life. As a devout Christian, Mr. De La Rosa integrates faith into his practice, another unique aspect that sets him apart from other financial planners.

WHERE WILL YOU BE IN FIVE YEAR?

Mr. De La Rosa's overarching objective is to extend his outreach to as many individuals as possible, aiming to educate them on mastering money management in the United States. He will teach retirement planning classes for the board members of Multiple Listing Network. With his focus remaining on helping the average American, Mr. De La Rosa plans to continue growing his company and bringing people on board who can replicate what he does.

THROUGHOUT THE DURATION OF YOUR CAREER, WHAT WAS THE ONE HIGHLIGHT THAT STOOD OUT THE MOST?

Mr. De La Rosa prides himself on effectively conveying the importance of saving money. He has deliberately acquired expertise in delivering impactful financial education that empowers individuals without dictating their actions. As a result of his approach, he has aided numerous individuals in eliminating their debt, a feat that underscores the efficacy of his strategy. His achievements are less about investment tactics and more about the personalized process of sitting down with individuals, elucidating the significance of planning, teaching them practical methodologies, and providing them with the necessary tools to attain their financial objectives. Mr. De La Rosa's methodology does not necessitate engagement solely with affluent individuals. It proves effective even with those who lack financial resources but have the aspiration to initiate and plan for their financial future.

EXTENDED BIO

Mr. De La Rosa authored and self-published "Wealth Grows When Your Cash Flows," a comprehensive workbook aimed at facilitating individuals' learning process in creating a financial plan. The book aims to empower individuals in establishing and executing a personalized financial roadmap, enabling them to assert control over their finances. With over 15 years dedicated to refining his approach to communicating financial planning concepts, particularly in the realm of savings, Mr. De La Rosa's book incorporates a five-minute money planning technique to streamline the planning process. His overarching strategy is centered on inspiring individuals to save money by providing practical, everyday actions that yield tangible results over time. Outside his professional life, Mr. De La Rosa's wife is a psychologist, and their married daughters also share in their family's deep spirituality, enhancing their familial connections. His motto is, "Wealth is not given; it is built daily."