



Portia L. White, CFP®

Portia L. White is a CERTIFIED FINANCIAL PLANNER™ practitioner, Vice President and a Senior Advisor at Whelan Financial. She began working for Whelan Financial shortly after graduating from Fresno State in 2004 having graduated Summa Cum Laude with her BA degree in Philosophy. She continued her education in the field of personal financial planning and investments and became a CERTIFIED FINANCIAL PLANNER™ practitioner in 2009.

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“ Although I have read books and listened to lectures on this topic, I have never had the terms and concepts defined and explained so clearly. Thank you!

”

Central California Women's Conference Attendee

“ Thank you for speaking and sharing your expertise... You left us wanting so much more and please know you are ALWAYS welcome back!

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Polka Dot Power House Attendee

Topics Covered

- Social Security Planning
- Medicare
- General Investing
- Financial Planning
- Retirement Planning
- Market Downturns & Recoveries

Speaker Engagements

- National Association of Women Business Owners: Fresno | 2017
- Fresno County Bar Association: Estate Planning Group | 2016 & 2017
- Central California Women's Conference | 2014 & 2016
- Fresno State: STAR (Sta Training & Recognition) Day | 2013
- Fresno State Wellness @ Work Series | 2012
- The 8th Annual Women's Physician's Retreat | 2011

