



Women Owned Law Member Spotlight Questionnaire
Amy Leis, Financial Advisor, Janney Montgomery Scott LLC

Tell us about your firm including: history, specialization, and years in business.

I provide financial planning and investment management for families and business owners. My specialization is in Sudden Wealth including inheritance, divorce, legal settlements, sales of businesses, and athletes & entertainers.

I've been with Janney Montgomery Scott for 13 years and my services include financial planning, tax-efficient investment strategies, small business advising, retirement income planning, education funding, charitable giving, risk management, and inter-generational wealth transfer strategies. Clients like the boutique experience, out-of-the-box thinking, and comprehensive planning.

What's an interesting fact about you or your firm most people don't know?

I have a PhD in Educational Psychology and a love of Behavioral Finance (the Psychology of Money). I enjoy using this knowledge to empower people make better decisions both personally and professionally.

What's a favorite moment of your career so far?

I've won some awards, done a lot of public speaking, and helped people financially plan through shockingly awful experiences of death and divorce. I've gotten to cheer for my clients who are Olympians, and celebrated growth with my business-owner clients.

One of my favorite moments was when my clients' Italian grandmother made me take home a huge tray of baked ziti because she was so happy I helped her family with their finances. She said she was so relieved she didn't have to worry about them anymore.

In this case my clients were her son with special needs, her daughter & son-in-law who was retired, 2 of her grandsons & their spouses, and 2 of her great-grandsons. Getting to serve multiple generations of families like this is an honor.

What challenge are you most proud of overcoming?

Being a working mom with a highly-energetic 7 year old can be challenging but rewarding. Am I exhausted? Yes! Is it worth it to have a successful practice and also have a flexible schedule to spend time with my daughter? Definitely yes.

Tell us about your morning ritual.

In an ideal world I wake up with the sunrise, stretch for 15 minutes, followed by 10 minutes of journaling and setting my intentions for the day.

In the real world my morning ritual includes rushing around the house yelling, "where are your shoes" for 10 minutes while my daughter finishes last minute homework as she slowly eats cereal one corn-puff at a time until the rest turns soggy and gets thrown away.

What advice would you offer new business owners?

You can't do everything and be amazing at it. Figure out your strengths and delegate as much as you can. This is hard in the beginning but use part-time employees, interns, virtual assistants, etc. Even a little bit of outside help is better than none. It takes time to train someone else and trust them with your systems but it frees you up to focus on the activities that drive business growth.

Also, don't quit—the first 3-5 years are going to have lots of ups and downs. This is a normal part of business development. Persistence pays off.

Save for retirement. Think you are saving enough? Save more. You can take out loans for business and to pay for college. You can't take out loans for retirement.

Every year go away by yourself for a day or two. Use the time to reflect on the past year and plan strategically for the next few years. Too often we get caught up in the day to day and it's helpful to set aside time for a personal retreat.

What do you wish you had known before starting your own business?

I wish I had known how much I would love it—I would have done it sooner.

How can you help other WOL members improve their business?

You're busy running your practice, serving your clients, and living your life. You have a lot on your plate—you don't have time to worry about money, plan for retirement, and keep an eye on the stock market. Let's meet! We'll talk about your goals and put together a customized plan of how to achieve them. We'll work together on saving and investing your money, retirement planning, business planning, and everything in-between. And having a financial advisor with a PhD in Ed Psychology, means there will be added value like discussions around the psychology of money and decision making strategies

How has your WOL membership been of value to you and your career?

From a professional perspective, my clients all need attorneys and other services. I like being connected to the women in WOL so I can send them referrals.

Personally, I work in a male-dominated industry and spending time with smart, accomplished, ambitious women is inspiring.

Guilty Pleasure: What can you not live without?

Sleep, books, and travel. Therefore, my ultimate guilty pleasure is to travel somewhere fabulous, sit in the shade and read all day, occasionally napping.

Nominate Someone!

WOL turns the spotlight on members to highlight how they are making a difference and how they have benefited from WOL membership.

It offers an opportunity for you to share your story with colleagues, inspire future entrepreneurs, and strengthen awareness of the profession and association. Member Spotlight appears regularly on <https://www.womenownedlaw.org/>. To nominate another member email: CoachDena@gmail.com