MEGAN KOPKA

Megan Kopka, a seasoned Certified Financial Planner™ (CFP®) professional and Registered Life Planner (RLP®) with over 15 years of experience, distinguishes herself in the financial planning arena. Her journey is deeply rooted in personal experiences, including roles as a caregiver and widow, shaping her distinctive approach to financial planning.

Facing pivotal moments early in her career, Megan's commitment to bridging the gap between financial planning and the nuanced needs of widows and caregivers became her mission. As a managing partner of Apprise Wealth Management, Megan combines her professional acumen and personal insights to offer comprehensive and empathetic financial solutions tailored for those facing similar circumstances.

Megan is a former educator and strives to educate women facing new beginnings about their personal financial well-being and best practices. In addition, she has been featured on podcasts, and spoken professionally for caregivers, widows, and inside the financial industry as it pertains to guiding widows through financial planning.

She launched her own Registered Investment Advisor (RIA) business so she could provide financial planning, personal finance, and investment management services and education to widows and caregivers. She believes that a client-advisor relationship is likely the most intimate professional relationship one can engage in. Please read this blog if you would like to learn more about what inspired Megan to start her own RIA and ultimately merge with Apprise and work with widows and caregivers.

Megan is the mother of two adult children: Bruce, her son, who is working in the Maritime industry, and Jaden, her daughter, who is pursuing her pilot's license. An active member of the Modern Widows Club, Megan is dedicated to inspiring and empowering widows and caregivers through her unique blend of personal and professional expertise.

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