




Cokie
BERENYI

Speaker | Author | Financial Advisor

MEDIA KIT

To book Cokie for your upcoming event, please contact Cynthia Hayes at cynthia@ladderingworks.com or 804-221-3486.



HELEN "COKIE" BERENYI, CFP, has been in financial services and serving the needs of individual and institutional clients and entrepreneurs since 1996. Mother, author, business owner, financial "samurai" and Perfect Day engineer, Cokie loves food, wine, travel, stray dogs, goat cheese, tennis, and alpine mountaineering.

Founder of Alphavest, an industry pioneer that is right-sizing Wall Street one client at a time, Cokie inspires investors and entrepreneurs at-large with her vision and storytelling of her many experiences leading clients through the financial and work-life-balance maze.

Author of *Perfect Day* and *The Liberated Investor*, a 40 under 40 recipient and Woman CEO of the Year 2012, Cokie is currently climbing the Seven Summits of the world and beat Stephen Colbert in the Charleston to Bermuda race in 2011. Founder of non-profits She-CLIMBS and Rein and Shine, Cokie's passion for entrepreneurship spans for-profit and not-for-profit arenas, alike.

Cokie is available for seminars, webinars, workshops, coaching, consultations, training, interviews and speaking engagements. She can speak on a variety of topics including, but not limited to the following.

SUGGESTED SPEAKING TOPICS

- *Overcoming the Challenges of Entrepreneurship*
- *Perfect Day Lifestyle: A Wholistic Approach to Work-Life Balance*
- *Your 411: 4 Things to do Before 11 a.m. Each Day*
- *Perfect Day 411 in the Workplace*
- *Being an Active and Responsive Investor*
- *Responding to the Market Instead of Sitting on the Sidelines*

ABOUT COKIE

WATCH COKIE IN ACTION

- **The Perfect Day Podcast:**
New Episodes Air Mondays at 8 p.m.
- **411 LIVE:** Facebook Live
Wednesdays at 5:30 a.m.

BOOKS AUTHORED

- *The Liberated Investor*
- *Perfect Day*

EDUCATION

Clemson University: Bachelor's Degree,
Financial Management/Accounting

CERTIFICATION

Certified Financial Planner

NONPROFIT FOUNDER

- **She-CLIMBS**
- **Rein and Shine**

AWARDS

- **Charleston 40 Under 40**
- **Woman CEO of the Year**

MEDIA

- **Skirt** (March 2018), "5 Tips for Curing Lifestyle Deficit Disorder and Creating Perfect Days"
- **Charleston Daily** (February 2018), "Charleston Entrepreneur Pens Guide to Cure Lifestyle Deficit Disorder"
- **Charleston Regional Business Journal** (July 2017), Best Advice Column
- **Huffington Post** (July 2014), "Why This Mom and Her Tween Daughter Climbed Kilimanjaro"
- **Charleston Living Magazine** (January 2017), "A Perfect Day"
- **Wall Street Journal** (July 2014), "Voices: Cokie Berenyi, on Rules-Based Investing"



WHAT PEOPLE ARE SAYING

"Cokie is passionate and utilizes her incredible wisdom and years of entrepreneurial experience to guide you in achieving balance and abundance in all areas of your life! She ignites a fire deep in your belly with her dissection of how you define success and envision a Perfect Day." – Christy

"[Cokie] anticipates months ahead of me, my goals, my needs, my tolerance. Her excellent recommendations have never led me astray. Working with Cokie is peace of mind." – Jessica

"Cokie took a personal interest in our lives and helped us to understand and define our core values and beliefs. Once we had defined the most important aspects in our lives, she helped direct us to align our financial goals with our lifestyle goals." – Dave

PREVIOUS SPEAKING ENGAGEMENTS

- **Find Your Summit with Mark Pattison** (August 2018), Climbing Denali and Perfect Days
- **Accelerate Your Business Growth** (August 31, 2018), Perfect Days Aren't Just for Retirement
- **Barry Moltz Show: Business Insanity Talk Radio** (August 2018), Perfect Days Aren't Just for Retirement
- **WTMA's Morning Show Charleston** (August 2018), Live Radio: Stepping Out of Your Comfort Zone
- **South Carolina Public Radio** (May 2018), Handling the Challenges of Entrepreneurship
- **DIG South** (April 2018), How to Have a Perfect Day With Author Cokie Berenyi
- **Healthcare Financial Management Association** (March 2018), The Perfect Day
- **Perfect Day Workshop**, Atlanta (March 2018)
- **The Dana Barrett Show** (February 2018), Your Perfect Day
- **Mindful Entrepreneur** (October 2017), A Perfect Day to Create Wealth
- **Build Your Best Business** (May 2017), Online Investing with Cokie Berenyi, Live from Dig South
- **DIG South** (April 2017), Curing Lifestyle Deficit Disorder
- **Perfect Day Workshop**, Charleston (2017)
- **Women Entrepreneurs of Charleston**

UPCOMING SPEAKING ENGAGEMENTS

- **Medical University of South Carolina** (September 2018)
- **The Business Power Hour** (September 2018)
- **Market Report** (September 25, 2018)
- **Harbour Club Speaker Series** (October 2018)
- **Center for Women Annual Conference** (November 15-16, 2018)

