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Kelli co-founded Francis in 2004 and leads Francis's workplace financial wellness services. She has been providing financial education to plan participants for over 30 years. Kelli works with plan oversight committees to evaluate employee engagement in the plan, ideate unique education campaigns, and drive the financial well-being of the workforce. She has a Master of Education degree focused on Adult Education from Carroll University, and has led her team to receive numerous industry awards for excellence in participant financial wellness education. Kelli is a CERTIFIED FINANCIAL PLANNER™ professional (CFP®) and holds a Series 65 license.