

THE ALISON FLAUM EXPERIENCE — OFFICIAL BIO OF ALISON JOY FLAUM

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"You can't swim & hold onto the ledge at the same time" — Alison



www.AlisonFlaum.com www.SimplifyingWealth4Advisors.com

Alison Flaum, CLU®, ChFC®, M.S., is a transformational speaker, nationally recognized advisor, and MDRT Top of the Table producer with nearly three decades in financial services. As she approaches age 60, after starting her career in her late 20s, Alison has become known for helping financial professionals realign the way they work and live. She is the creator of The Alison Flaum Experience and founder of Simplifying Wealth for Advisors — a platform supporting advisors throughout the globe who are navigating the demands and responsibilities of this noble profession. Her work is not about product or sales; it is about the advisor as a human being — someone who can easily get pulled in a hundred directions. Alison helps advisors stay anchored so they can serve others without losing themselves.

Early in her career, Alison recognized a pattern. Advisors of every experience level—new and seasoned—would pull her aside seeking guidance. They weren't struggling with product or mechanics — they were struggling with themselves: boundaries, alignment, confidence, overwhelm, exhaustion, and losing their identity in a profession that constantly tells them who to be. What came intuitively to Alison—filtering, triage, alignment, practical structure, presence, mindset, boundaries—wasn't intuitive for others. She realized her way of thinking could change not only practices, but lives.

Alison's perspective and insights were shaped early in life. Her father died of sudden heart failure when she was four, and his life insurance had lapsed six months earlier, now qualifying her and her younger sister for the free-lunch program at school. Orphaned before entering high school when her mother took her own life, Alison was 15. These life events taught Alison firsthand the power of choice. She learned that experiences are not good or bad—they simply are. What you do with them, how you interpret them, and the direction you choose to move next is always yours to decide.

Alison chose to volunteer as an EMT when she was in the 10th grade. She did the work and had the passion, often becoming the first person on the scene—calling the shots, making decisions, and being responsible for strangers in life-or-death moments. These weren't hobbies — they were early lessons in responsibility, awareness, teamwork, self-trust, and adjusting quickly when life knocks you off your feet. She received a local Citizen of the Year award for her service. Her ability to stay grounded in "tornado moments," whether chaos came at her or she ran toward it, became the foundation for how she now helps clients and advisors navigate the constant noise of life and business.

Before transitioning into financial services, Alison served for more than a decade as an active emergency responder and Director of Public Safety, responsible for leading people, teams, and systems through high-stakes environments. Her background in triage and real-time decision-making built the foundation for how she helps her clients and advisors filter, focus, and manage what comes at them in a world that rarely slows down.

When she entered the profession in 1997, Alison built her practice around alignment, not sales. For more than 20 years, she has been the number one top producer in her San Antonio general office, known for comprehensive planning without product bias and for creating advisor-centered systems that support sustainable, meaningful careers.

Alison has been a single mom raising two young boys—24/7—after divorcing when kids were 4yrs old & 8 months old, choosing health and stability over remaining in an unhealthy environment. The same incident-responder mindset that kept her grounded in chaos helped her navigate numerous illnesses and derailments throughout life, relying on her creativity, insight, and the systems she put in place long before to stay fully operating. This mindset is what she now teaches advisors to use in their own lives and practices.

Her influence extends across the country and internationally. She has spoken for MDRT Top of the Table, corporate kickoffs, national leadership events, and advisor groups abroad, including in Mexico. Her powerful stage presence resonates emotionally and professionally — moving, inspiring, and transforming audiences with a message that is simple, compelling, and easy to implement. Advisors often describe her teachings as “the aha moments of wisdom that change everything.”

Alison, also an artist who works in watercolor and mixed media, sees life and planning the way she sees a canvas: every experience, resource, and relationship is a color, stroke, or texture. Some stay, some shift direction, some get painted over, and some become the anchor of the entire piece. She enjoys culinary arts, creative exploration, time in nature, with her now adult kids and travelling the world when not serving clients and other advisors.

Her philosophy is consistent: life is always in the making & tomorrows are not promised to anyone. Some things happen to you, some happen because of you, and both offer direction. You choose whether to go through, over, around, or above. Hard work is not sacrifice, when it aligns with who you are and what matters to you. And mindset—not magic—is what shapes the life you live, the practice you build, and the impact you leave long beyond your years.

Alison knows how to rock a stage and transform an audience—just don't ask her to read from a teleprompter. She stays on time with a timer and empowers audiences to rise above chaos. As an active advisor still running her planning practice, while writing a few books, creating Knowledge Bucket trainings for advisors, and taking intentional time off, she chooses to book only three to four main-platform speaking engagements per year—so lasso her in early by completing the speaker request form or emailing Admin@SimplifyingWealth4Advisors.com. See you soon!