

**Anne Holland, CFP®,
Owner/Strategic Financial Advisor
Plan+Tactics, LLC**

For more than 33 years, Holland has provided financial and advisory services for a variety of corporate, individual and non-profit clients. Holland's extensive background includes strategic and financial consulting, real estate development, public speaking, banking/investment services, executive leadership and mentoring. Holland began her career at Texas Commerce Bank in Houston and held a variety of positions throughout the company's growth into the JP Morgan Chase system. She founded and sold a professional services company and provided project leadership for a local real estate development firm. Holland spent several years at Southside Bank (formerly OmniAmerican Bank) as Senior Executive Vice President and Chief Lending Officer. She led the Sales and Marketing Team, which included Commercial Lending, Commercial Real Estate Lending, Treasury Management, Mortgage Lending, Investment Services and the Retail Branch locations. Through Plan+Tactics, LLC, Holland serves as an advisor to families/family businesses on matters relating to strategic planning, estate organization and structuring, charitable planning, real estate, financial planning, and financial education.

Holland received a Bachelor of Business Administration in Finance and Real Estate from Texas Christian University. She completed the Certified Financial Planning Program at the University of North Texas and received her certification in 1999. She is a graduate of Leadership Fort Worth and Leadership North Texas. Holland has been recognized by the *Dallas Business Journal* as a "Woman to Watch" and by the *Fort Worth Business Press* for "Forty Under Forty" and as one of the "Great Women of Texas." Holland has served in leadership roles throughout the business, professional and non-profit community by contributing to a variety of boards and committees, including The North Texas Community Foundation (Board Member, Nominating Committee Member, Treasurer), The Jordan Elizabeth Harris Foundation (Finance Committee, Board), Texas Health Resources Community Impact Board (Vice Chair), Harris Southwest Hospital (Board Member), the Greater Fort Worth Real Estate Council (Board Member, Committee Chair), the Fort Worth Chamber of Commerce (Board Member, Committee Chair), Women Steering Business (Executive Committee Member), and Camp Fire First Texas (Board Development Committee). Holland lives in Fort Worth, is married and shares six children with her husband, Barney.