



“I am very passionate about helping others and educating them.”

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Diana Bacon has built an advisory practice based on her passion for helping and educating others. She specializes in working with executives, small business owners, retirees, and families and provides tax and investment advice to executives of Fortune 500 companies, with a focus on stock option strategies. She also oversees all aspects of personal financial planning for her executive clients, including income tax, estate tax, investments, and retirement savings.

As a component of her family-based financial planning strategy, Diana works with trustees and parents to teach beneficiaries and children how to set a budget, manage money, and transition from family payroll to managing their finances independently. She also works with entrepreneurs to ensure their personal and professional ventures are focused. Diana has earned the Certified Divorce Financial Analyst designation and finds her work with couples during a difficult time very rewarding. Diana especially enjoys working with women going through life and/or work transitions, helping make their transitions easier and empowering them to make careful, educated decisions. She believes in the importance of helping clients who may be underserved or whose needs may be less well understood among more traditional firms, and has extensive experience advising and serving the LGBTQ+ community and their families.

Diana began her career at Ayco, a Goldman Sachs Company, in 1998 as a Financial Analyst and Financial Planner, and she also served as Regional Training Coordinator for the firm. Moving to Ernst & Young, Diana joined as a Senior Planner and was promoted to Manager. She founded Bacon Financial Management in 2006 and merged with Financial Strategies Group in 2015. Diana joined Apella in 2020.

Born and raised in San Diego, CA, Diana earned a Bachelor of Science in Mathematics from the State University of New York (SUNY) at Albany, and an MBA from Dallas Baptist University. She also spent several years at California State University, Chico studying mathematics.

When she's not helping clients build their financial futures, Diana competes as a weightlifter and is a strength and conditioning coach for children. She's very active in her community, chairing her church's endowment committee and teaching Sunday school, which she has done since 2004. She has also served as treasurer and board member for a local no-kill animal shelter. Diana speaks publicly to a variety of Dallas organizations on women's issues, LGBTQ+ issues and how to be a better ally in the workplace.

Diana and her husband are proud parents of two children (and two rescue dogs), and love living in Dallas by beautiful White Rock Lake.



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Why did you become a financial advisor?

The Bacon family business has always been teaching. My grandparents were elementary school teachers, and many of my cousins are also educators – college professors and special education teachers. My original ambition was to be a math professor, but a friend encouraged me to think about financial planning. I quickly realized that it was a mix of everything I enjoy, numbers and analysis plus teaching and educating and working with people. It was a perfect mix for me, and I get to help people for a living. I'm a very values-driving person, and I try to live by my values of compassion, kindness and empathy and strive to understand the values of each client so they can be reflected in our work together.

What is your proudest professional achievement?

Someone I knew from my animal welfare work referred his mother to me after his father had passed away. I worked with her for a decade. Now he and his brother are both clients, and I helped them close out their mother's estate after she passed away. I was able to see how our planning had succeeded and how it made the brothers' lives easier. Simply put, I did my job, I did it well, and I could see how I had a part in making lives better.

You can start working with someone when their children are toddlers and help with education planning. When you watch those kids graduate from college, it's so satisfying. Seeing the results of my work in this way keeps me going.

What are you most passionate about?

I am very passionate about helping others and educating them. If I'm not educating clients about their options, I'm definitely not doing my job. If they don't understand the financial steps they're taking, I'm not doing my job. That same thread runs throughout my life. When it's not wealth advisory, it's coaching kids and helping them gain confidence in their bodies or teaching Sunday school and showing kids how to go out into the world and strive to be good people.

Who has been most influential in your life?

My mom has been enormously influential, as she has always placed great emphasis on making a difference. I completed my MBA while I was working full time, and when I finished, she asked me what I was going to do with all the free time I now had (even though I was working very long hours). I told her I was going to buy a TV and read books not related in any way to finance. She said, "That's ridiculous, you need to find an organization this week and start volunteering." In response, I started with the animal shelter. Once they discovered I had an MBA, I was suddenly on their board.