BIOGRAPHY
KAREN P. SCHAEFFER, CFP®

Karen P. Schaeffer is the Managing Member and Co-founder of Schaeffer Financial LLC, a financial consulting firm in suburban Washington, D.C. She has been advising clients for over thirty-five years and has developed a diverse client base including professional women, Foreign Service Officers, foreign nationals and Federal government employees.

In addition to her financial planning practice, Karen is a popular lecturer and seminar leader. She has spoken on global financial planning issues at many international conferences and has represented the CFP Board at Financial Planning Standards Board meetings around the world. Routinely she conducts programs on a wide variety of topics, from minimizing estate taxes to developing investment strategies, to planning for retirement. Some of the organizations that have drawn on her expertise include The World Bank, The Department of Treasury, The International Monetary Fund, FDIC and The Department of State.

Karen is currently certified by the CFP Board, and holds health and life insurance licenses. She has served as Chair of the Financial Planning Standards Board, the global standard setting body for Certified Financial Planners outside the United States. Karen has also served as Chair for the CFP Board. She is a past Chair and current Trustee of the Board at The Academy of the Holy Cross. She is also Life Director for the Board of Montgomery Hospice. She is a member and past National Board Member of the Financial Planning Association, a member of the Estate Planning Council of Washington, D.C. as well as the International Women's Forum. Karen received the Investment News Lifetime Achievement Award in 2018 and was named one of their Women to Watch in 2016. Karen received her Bachelor's degree from Grand Valley State University in Michigan.

Karen is also an adept and engaging instructor. She has held adjunct faculty positions with the College for Financial Planning in Denver and George Washington University in Washington, D.C. She has worked with the National Institute of Transition Planning as well as McGehrin & Associates for 25 and 15 years, respectively, as an instructor and educator. Karen is often asked to design and teach continuing education courses for CFP certificates, CPAs and other financial services professionals.

Karen's publishing credits include articles in Business Review, Best's Review, and the Financial Planning Encyclopedia. She has coauthored a book titled; Education Savings Planning Guide. She has been quoted in The Washington Post, The Wall Street Journal, the New York Times and Money Magazine and has appeared on many radio and television programs including the Wall Street Journal Review, a syndicated television program.

2021