



Many advisors say they "do" special needs planning, presenting it as just another aspect of their practice or as almost a "one-size-fits-all" solution. However, when faced with a life-changing diagnosis for her daughter, **Kacy Seitz** had a profound realization: the lackluster approach offered by these advisors merely scratched the surface of her family's new reality. Kacy recognized her untapped

potential as both an expert in the financial services industry and someone who knows the careful consideration that comes from a place of shared experience.

Since 2013, driven by a deep sense of purpose, Kacy has wholeheartedly devoted her financial planning practice to cater to Special Needs families. At the core of Whole Story Planning lies a powerful mission to alleviate the burden of isolation and loneliness often faced by special needs families nationwide.

She understands families' profound daily challenges and is determined to provide each caregiver with the necessary support and guidance to navigate a complex financial landscape. With her unwavering dedication and compassion, she strives to create a sense of belonging for every family member, enabling everyone to lead a fulfilling life. Kacy's ultimate goal is to foster a community where special needs families are understood, supported, and connected, leaving no one to face their journey alone.



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