



Barjes Angulo

HUMAN
ADVISOR
MENTOR
SPEAKER

“Talking about money is a lot like getting naked in front of someone.” - Barjes

So let's get naked.

Your Personal CLFO (Chief Life-first Financial Officer)

Barjes Angulo is a financial strategist, mentor, and speaker who helps self-made business owners align their wealth with what matters most. With over two decades of experience, Barjes brings a lifestyle-first approach to financial advising (for himself, his clients, and his colleagues) – one that integrates personal values, business goals, and long-term vision so life influences work, not the other way around.

- Financial Planning + Advisory Outcomes
- Practice Design + Sustainability
- Independence + Advisory Ownership
- Human-centered Operations
- Advisory Growth, Transitions + Decision-making

TOPICS OF INFLUENCE



BARJES ANGULO

barjesangulo.com

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“Barjes talked about advisory work the way it actually feels day to day. It was refreshing, and honestly—rare.”

- Jay T.



“He helped me think much more clearly about how I’m running my practice and what I don’t need to keep doing.”

- Leticia G.

POPULAR KEYNOTES

From Transaction to Trust

A practical roadmap for advisors moving from commission-based models to fee-based relationships – covering mindset, client communication, and operational shifts that support long-term growth.

LEARN

- How to reframe your value from “product” to ongoing guidance.
- What clients need to hear during a pricing and model transition.
- Structural changes that make a fee-based practice go from stressful to sustainable.

The Modern Advisory Practice

An inside look at how virtual resources, smart delegation, and the right infrastructure can free advisors from day-to-day friction without sacrificing quality or control.

LEARN

- Where virtual support creates the highest leverage (and where it doesn't).
- How to regain time without breaking compliance or client trust.
- Systems that allow advisors to focus on planning instead of admin.

Workflow That Works

A workflow-focused session on reducing bottlenecks, clarifying ownership, and creating momentum across advisory teams so work moves forward instead of piling up.

LEARN

- How to identify friction points slowing your team down.
- Simple workflow structures that improve accountability and follow-through.
- Ways to align people, process, and technology for smoother execution.

Book Barjes and learn more at barjesangulo.com