Mills Wealth Advisors Welcomes Fifth Certified Financial Planner to Team

September 15, 2025

Southlake, Texas - September 15, 2025 -
Mills Wealth Advisors announced that Helen Esomo has earned the CERTIFIED FINANCIAL PLANNER certification, becoming the firm's fifth CFP professional. Esomo satisfied CFP Board's education, exam, experience, and ethics requirements and earned the credential on August 6, 2025, following the July 2025 exam window.

The CFP certification indicates broad-based planning competency and a commitment to ethical standards. The certification process requires approved coursework, a comprehensive exam, verified professional experience, and adherence to the CFP Board's Code of Ethics and Standards of Conduct. CFP professionals also agree to act as fiduciaries when providing financial advice, putting clients' interests first.

"Adding another CFP professional deepens our planning bench for business owners, executives, and multigenerational families," said Stephen Nelson, a principal of the firm. "Helen's achievement supports our evidence-based approach and reinforces the level of preparation we bring to retirement-income design, tax

planning, and risk management."

The addition of another certified professional strengthens the firm's capacity to serve clients seeking comprehensive financial planning services. For families coordinating retirement income, tax-aware investing, and risk management, the designation helps signal that their planner has received training to integrate multiple disciplines into a cohesive plan.

"I pursued the CFP certification to strengthen the way I serve clients through comprehensive, values-aligned advice," said Helen Esomo, CFP, Associate Wealth Advisor at the firm. "The process sharpened my skills across planning domains so clients can make confident, well-informed decisions about their financial lives."

Esomo's certification reflects broader national momentum in financial planning. As of December 31, 2024, the number of CFP professionals in the United States reached a record 103,093. CFP Board reported that the July 2025 exam was administered to 3,214 candidates, with a 64 percent pass rate, underscoring continued interest in professional standards for financial advice.

The achievement comes as financial advisors across the industry pursue advanced credentials to better serve clients navigating complex financial landscapes. The CFP certification has become increasingly recognized as a standard for comprehensive financial planning expertise.

Mills Wealth Advisors is an SEC-registered investment adviser based in Southlake, Texas, serving businesses, individuals, and families since 1999 and operating as an independent registered investment adviser since 2012. Through its CORE+ process, the firm provides evidence-based portfolio management and comprehensive financial planning, including retirement-income strategies, tax planning, exit planning, and 401(k) consulting. As of December 31, 2024, Mills Wealth Advisors oversaw approximately $402 million in discretionary and $38 million in non-discretionary client assets, plus $3.27 million under advisement.

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level of skill or training.

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