

SPEAKER PACKET

# The Confidence Tax

*& other talks for women who lead.*

**SHELLEY NADEL**

CFP® · CLTC® · LUTCF





## ABOUT SHELLEY

# The wealth voice women actually listen to

Speaker · Author · Wealth Strategist

**S**helley Nadel is on a mission to put more women in the top leadership seats in corporate America, government, and beyond — and she believes financial confidence is the secret engine that gets them there.

A Certified Financial Planner® professional, Wealth Advisor, author, and speaker, Shelley leads the Houston office of Radian Partners, LLC and is the founder of Financial Success Strategies LLC and *Food and Finance with Shelley Nadel* — her signature brand, seen on YouTube, LinkedIn, Instagram, television, and in her book *The Wealth Recipe: A Culinary Guide to Financial Power*.

Her teaching style is unmistakable: warm, plainspoken, and free of the financial jargon designed to intimidate. She rejects fear-based messaging in favor of empowerment — helping women link financial confidence to the leadership confidence they need to claim any seat at any table.

Since 2007, Shelley has delivered financial literacy programs to corporate and community audiences of 20 to 200, including ongoing engagements with Baker Hughes and Gensler.

## IN THEIR WORDS

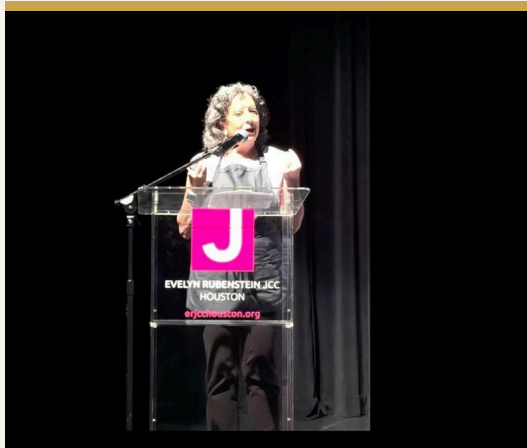
# She makes you want to *talk about money.*

**No. 01** *I've known Shelley for years, but watching her on CW39 was something else entirely. She owned that segment. What strikes you immediately is how effortlessly she makes financial topics feel relevant and even entertaining – no small feat on live television. She's warm, quick, and completely at ease, and you can feel the audience leaning in. Shelley has a rare gift: she makes you want to talk about money.*

**JENNIFER MASON · FORMER NASA PROGRAM SPECIALIST**

**No. 02** *We have so enjoyed having Shelley join us in the office to share her knowledge of personal finance. Her "food and finance" mantra makes her very relatable and approachable. More importantly, she has taken what can often be an overwhelming subject and put it into bite-size pieces, giving us a greater sense of confidence as we manage our own personal finance decisions.*

**STEPHANIE BURRITT · PRINCIPAL, GENSLER**



## THE APPROACH

# She turns complex ideas into dishes audiences can *taste*.

Through her dynamic personality and signature *Food & Finance* approach, Shelley turns complex financial ideas into memorable stories and relatable experiences audiences can immediately connect with and apply.

Her passion is helping high-achieving women stop paying the hidden costs of hesitation, silence, underpricing, and overcomplicated financial advice — and start building wealth on their own terms.

## FIVE SIGNATURE TALKS

- |     |                                |   |
|-----|--------------------------------|---|
| I   | <b>The Confidence Tax</b>      | <i>How hesitation can burn your financial future — and how to save the dish.</i>  |
| II  | <b>Money on Mute</b>           | <i>What's been on the shelf too long — and what it's costing you.</i>   |
| III | <b>Priced Like Store Brand</b> | <i>Why the most accomplished women in the room are still negotiating like they're on sale.</i>  |
| IV  | <b>The Complexity Trap</b>     | <i>Why the smartest women in the room are paying the highest price for financial complexity — and what three ingredients can teach them about building real wealth.</i> |
| V   | <b>The Untouched Plate</b>     | <i>She knows every number in her business. Ask her about her own finances, and the kitchen goes cold.</i>   |

## SEE SHELLEY IN ACTION



The best way to experience Shelley is to see her. Watch a sampling of Shelley speaking and see how *Food & Finance* with Shelley comes to life on stage.

► **Watch Shelley Speak**

*Or scan the QR code to view on any device.*

Presentation One

# The Confidence Tax

*How hesitation can burn your financial future — and how to save the dish.*

Every time a high-achieving woman delays a financial decision — waits for more certainty, defers the conversation, sits on an investment — she pays a price that never appears on any statement. Shelley calls it *The Confidence Tax*. And yes, she's qualified to talk about it — not just because she's spent nearly two decades in financial services but because hesitation once cost her everything. Shelley knows how waiting can literally drain your accounts and uses *The Confidence Tax* talk and pie crust to explain how to change your financial recipe/direction.



## LEARNING OBJECTIVES

- i.** Identify the hidden financial cost of hesitation and delayed decision-making.
- ii.** Understand the compounding impact of risk aversion on long-term wealth.
- iii.** Recognize the specific patterns that trigger financial inaction in high-achieving women.
- iv.** Apply a decision framework that replaces hesitation with informed, confident action.

## SUGGESTED FORMAT

Keynote

## IDEAL AUDIENCE

*Women's leadership conferences, executive women, female entrepreneurs, high-performance groups.*



## Presentation Two

# Money on Mute

*What's been on the shelf too long – and what it's costing you.*

Shelley walks onto the stage holding a jar of something rare and extraordinary — and turns it over to check the expiration date. That jar is the central metaphor for this talk: the financial voice women possess but leave unused until the moment has passed — in boardrooms, salary negotiations, advisor meetings, and their own inner dialogue. *Money on Mute* is a self-advocacy and financial presence talk that names what goes unspoken, unasked, and overlooked — and shows women leaders that it is not too late to open it.

### LEARNING OBJECTIVES

- i.** Identify the moments and environments where women most commonly silence their financial voices.
- ii.** Understand the measurable career and wealth impact of under-advocacy in financial conversations.
- iii.** Build language and frameworks for speaking up about money with clarity and authority.
- iv.** Develop a personal self-advocacy strategy for boardroom, negotiation, and advisory settings.

### SUGGESTED FORMAT

Keynote · Workshop

### IDEAL AUDIENCE

*Senior executive women, women's leadership conferences, corporate leadership groups, female founders.*

*Presentation Three*

# Priced Like Store Brand

*Why the most accomplished women in the room are still negotiating like they're on sale.*

Shelley holds up two identical cans — same factory, same contents. One carries a premium label; the other is generic. The price difference is staggering even though the ingredients are identical. This is the talk that finally names what high-earning women already sense but rarely say out loud: there is a gap between their actual value and what they charge, accept, and negotiate — and that gap is costing them real money. *Priced Like Store Brand* is a financial self-worth talk with teeth, humor, and a prop reveal the audience won't forget.



## LEARNING OBJECTIVES

- i.** Recognize the specific financial behaviors that signal self-underpricing in high-achieving women.
- ii.** Quantify the compounding wealth impact of undervalued fees, salaries, and equity stakes over a career.
- iii.** Understand the psychology behind premium versus discount self-positioning in financial contexts.
- iv.** Apply a three-move framework for repricing salary, fees, and financial non-negotiables — starting immediately.

## SUGGESTED FORMAT

Keynote · Workshop

## IDEAL AUDIENCE

*Women's leadership conferences, female entrepreneurs, executive women, professional women's groups.*



### Presentation Four

# The Complexity Trap

*Why the smartest women in the room are paying the highest price for financial complexity — and what three ingredients can teach us about building real wealth.*

Cacio e pepe — a classic pasta dish famous for its simplicity — is standard fare in Italian cuisine. Shelley juxtaposes that recipe with Beef Wellington, an extremely complex dish requiring hours of preparation, precision technique, and a dozen components that must all work in perfect sequence just to get to the table. Cacio e pepe is simple and easy to digest, and the same is true of financial plans: less complexity leads to easier adoption and implementation.

## LEARNING OBJECTIVES

- i.** Identify the hidden fees, tax drag, and illiquidity costs embedded in complex financial products.
- ii.** Recognize why high-achieving women are disproportionately steered toward financial complexity — and who benefits from it.
- iii.** Distinguish between genuine financial sophistication and complexity designed to benefit the advisor.
- iv.** Run a personal audit for hidden complexity costs and build a simpler, personalized, more powerful financial strategy.

## SUGGESTED FORMAT

Keynote · Lecture

## IDEAL AUDIENCE

*Executive women, female entrepreneurs, women's leadership conferences, high-net-worth professional women.*

Presentation Five

# The Untouched Plate

*She knows every number in her business. Ask her about her own finances, and the kitchen goes cold.*

Shelley holds a beautiful leather-bound menu in one hand and a blank index card in the other. The menu represents what every woman in this room builds for her business — detailed, strategic, profitable. The blank card is her personal financial picture. The most dangerous blind spot in any high-performing woman's life is not incompetence — it is the assumption that professional mastery transfers automatically to personal finance. It does not. This talk names the blind spots most common to high-achieving women, shines a light directly on them, and closes the gap — live, on stage — with six questions every woman in the room should be able to answer before she leaves.



## LEARNING OBJECTIVES

- i.** Identify the specific personal financial blind spots most common among high-achieving professional women.
- ii.** Understand how leadership strengths can create personal financial vulnerability.
- iii.** Complete a six-point personal financial audit covering cash reserves, equity, beneficiaries, and estate documents.
- iv.** Leave with a concrete action plan to close the gap between professional financial excellence and personal financial security.

## SUGGESTED FORMAT

Keynote · Workshop

## IDEAL AUDIENCE

*Women's leadership conferences, executive women, female business owners, corporate leadership groups.*

AS SEEN ON

# Television, print, and podcasts that trust her *voice on wealth.*



TELEVISION

## CW39 Houston

Featured Financial Expert. Interviewed by host Maggie Flecknoe; developed 13 original segments airing weekly on CW39 Houston, each accompanied by a re-air.

13 ORIGINAL SEGMENTS · 6-MONTH RUN

PRINT & DIGITAL · FORBES

### "What Do Jalapeños Have to Do With Your Financial Plan?"

Forbes / Ellevest, February 2022.

PRINT & DIGITAL · FORBES

### "Be the Chef in Your Own Financial Kitchen"

Forbes / Ellevest, March 2022.

MAGAZINE

### "Mastering the Recipe for Financial Success"

CXO Inc. Magazine – feature interview.

MAGAZINE · PRINT FEATURE

### "Money & Deep Dish Pizza: How Are They Connected?"

Winnetka Kenilworth Living.

PODCAST

### The Augmented Advisor – with John Prendergast

"Getting Leads by Filming a Cooking Show in Barcelona on an iPhone?"

PODCAST

### The One Problem Podcast – with Avil Beckford

Navigating a volatile stock market.



LET'S BRING HER TO YOUR STAGE

# Book Shelley.

**SHELLEY L. NADEL**

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**OFFICE**

512.662.6262

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**MOBILE**

281.797.1442

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**EMAIL**

[shelley.nadel@radianpartners.net](mailto:shelley.nadel@radianpartners.net)

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**WEB**

[foodandfinancewithshelley.com](http://foodandfinancewithshelley.com)

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