



Mike Turi Launches New Firm with XY Planning Network

Upbeat Wealth to specialize in providing financial planning for Generations X & Y and entrepreneurs, small business owners, real estate professionals and young families.

FOR IMMEDIATE RELEASE

New Orleans, LA – June 29, 2021 – Upbeat Wealth, a new financial planning firm founded by Mike Turi, is set to open this month with the help of [XY Planning Network](#) (XYPN), the nation’s leading organization of fee-only financial planners serving Generation X and Generation Y clients. In addition to Gen X & Y, Upbeat Wealth will also specialize in entrepreneurs, small business owners, real estate professionals and young families.

“As someone who is passionate about my local community, it is my honor to serve those that are the bedrock of what makes our neighborhoods so special - our innovators, creators, and go-getters that bring us together and push us forward. Our goal is to provide them with financial guidance, confidence and resources so that they can focus on the things that excite and drive them.,” said Mike.

Mike joins XYPN after a decade of contribution to the industry. Mike is a proud graduate of the A.B. Freeman School of Business at Tulane University and spent the better part of the last 10 years serving clients at Ameriprise Financial before leaving to start his own firm. Mike started Upbeat Wealth to make financial planning more accessible, focused on providing insightful advice, without selling proprietary products or mandating restrictive account minimums.

XY Planning Network kicked off a movement in 2014 to make financial planning accessible to the underserved Generation X and Generation Y populations by using a monthly subscription model rather than the traditional Assets Under Management (AUM) compensation structure. Charging a fixed or hourly fee ensures advisors work in the best interest of clients rather than for personal gain. As a member of XYPN, Mike Turi was required to sign a fiduciary oath, among other membership standards.

XY Planning Network offers a virtual community for new and established financial advisors, providing members with invaluable support in areas such as compliance, marketing, and business coaching. Additionally, members benefit from a wide range of technology solutions to support their firms.

To learn more about Upbeat Wealth, please visit www.upbeatwealth.com.

About XY Planning Network

XY Planning Network (www.xyplanningnetwork.com) is the leading organization for fee-only financial advisors who want to serve their Gen X and Gen Y peers providing comprehensive financial planning services for a monthly subscription fee and without product sales or asset minimums. The Network offers a virtual community for new and established financial advisors who want to serve a younger clientele, and provides its members compliance support services, marketing support, business tools and templates, and a wide range of technology solutions.

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