



Sherri Palle
Business Practices
Project Manager
CUSO Wealth Strategies Inc.

Sherri helps the entire CUSO organization connect the dots and make sense of the complex world in which they operate – so they can gain control, coordinate their efforts, exceed partner expectations, embrace automation, achieve their goals, reduce stress, and restore passion and enthusiasm for what they do.

MBA
(Master of Business Administration)



Sherri Palle

BUSINESS PRACTICES PROJECT MANAGER

Sherri is fervently committed to helping financial professionals and financial institutions either fine-tune or completely re-engineer their advisory practice to create success by systematizing and growing their practice. She will become fully entrenched in your business to provide the best advice possible. She is known for her high-energy calls which provide motivation, enthusiasm, and thought provoking 'aha moments' – making these calls something the entire team looks forward to.

Prior to partnering with Terry Gronbeck-Jones to form Mindset Consulting, Sherri spent nine years as a Business Coach at Pareto Systems where she worked with teams all over North America. She also developed and delivered customized training programs for several financial firms.

Previously, Sherri spent nine years in the financial services industry where she naturally gravitated to developing systems and process – to create order and quality control for all aspects of the client experience. Her industry knowledge and experience put her in a unique position to help teams fully implement a results-driven process. She highly recommends the E-Myth by Gerber and The Go-Giver by Burg & Mann.

Sherri has a variety of education, including industry-related:

- Certified Professional Consultant on Aging (CPCA®) 2017
- Professional Financial Planner (PFP) 2000
- Canadian Securities Course (CSC) 1997
- Conduct & Practices (CPH) 1997
- Master of Business Administration (MBA) 1996, University of Victoria, Victoria BC.
- Bachelor of Commerce (Marketing) 1991, Mount Allison University, Sackville NB.

More About Sherri

Sherri lives in the sea-side town of Sooke on Vancouver Island, British Columbia. She enjoys keeping busy with her three children: Ayden, Ethan and Samantha. This includes supporting their increased independence as they move from teenagers to young adults, as well as volunteering with them for various school, sport & community initiatives. Personally, she thoroughly enjoys keeping fit by walking daily and attending a feisty Zumba class. She likes to read self-help and business-related books, but also looks forward to indulging in a great rock concert! Sherri's life has been personally affected by Autism and she has fully embraced advocating for this cause. She is a member of the BC Autism Society and Founder of the Sooke Autism Support System (SASS).

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