



BACKGROUNDER ON WEALTH MANAGEMENT AND FINANCIAL SERVICES EXPERIENCE

Deborah Pratt Johnson Burns
Founder, Managing Partner, Mentor

“Financial literacy is not formally taught in high school or in college, unless it’s a one-off personal finance course, or as part of a finance or business degree,” Burns explains. “As a result, many consumers don’t have an advantage in business or in life without the financial tools and knowledge they need to succeed, and I’m committed to helping change that paradigm.” According to The Council for Economic Education, as of 2021, only six states require H.S. students to complete a semester-long, personal finance course to graduate.

Childhood -- Where it all Started

As far back as I can remember, my mom, Charlotte or "Lottie" loved the world of business and was a savvy investor and shrewd businesswoman. In the early 50’s into the 60’s, she was an exception to the "homemaker" of that era. She taught us about the importance of financial independence, of valuing our worth at home, and in the working world.

Throughout my life she would teach me about the importance of investing early. In fact, my childhood best friend, Anne, recently reminded me that my mom would "talk stocks" with us -- and with a laugh she said, and we were 7 years old!

Born in Scotland, my mom and her parents emigrated to the U.S. when she was a baby. Her Scottish lineage and upbringing taught her the value of money, and the importance of saving. The Great Depression also made an indelible impact on her life at the tender age of 9 years-old, and subsequently, on our lives.

One thing she would always say to us, "Save your money," which still echoes in my mind today. She was a kind and generous woman, who also taught me and my older sister, Wendy, the importance of giving back and helping those less fortunate.

A Natural Entrepreneur At An Early Age

I became an entrepreneur at age 12, running a car washing business in the neighborhood. As my mom was an amazing cook, my sister and I learned to cook at an early age. I began making small zucchini and carrot cake mini loafs, packaging them beautifully, and giving them to friends as gifts. At age 15, I launched Deborah's Harvest Breads a gourmet specialty bread enterprise, selling them to neighbors, friends, and at my high school in Locust Valley as part of fundraising efforts. My small cottage business grew exponentially, and my mom suggested that I rent a commercial kitchen. As it was only a hobby, and I was now a Junior in High School with aspirations to become a journalist, I decided to scale down and only sell to my friends and classmates and focus on my schoolwork. I graduated with honors in the top ten percent of my graduating class.

High School Graduation to 35 – The Formative Investing Years

As a High School graduation present, when I was hoping for the shiny new car or European vacation, my mom gifted me shares of Citicorp stock, which would change the course of my life, forever.

Thankfully, mom's Brown's Business School (New York) education paid off, as she was able to raise my sister and me, and put us both through college, by expertly managing our late father, Wendell's, investment portfolio. Our Dad passed away at the age of 50 of a brain tumor. My sister, Wendy, was 14 and I was 3 years old. My mom was only 44. She never remarried as he was the love of her life. I learned as much as I could about the stock market and began investing, yet it was at the age of 30 that I began investing in earnest.

Little did I know that in five years I would be married to the love of my life, would serve as a power of attorney and executor of my late mother's estate.

The Golden Road Age 35 to Present.

By great good fortune and what I believe to be divine intervention, then Earle Palmer Brown agency President, Fred Thompson, and I won the U.S. Trust PR account when was 35 or in 1996. I had risen through the ranks at Earle Palmer Brown and survived four buyouts over an eight-year period. Fred and I launched the Consumer PR Division in the mid-90s.

At the time, U.S. Trust was one of the oldest and most respected independent wealth management firms in the nation. It was acquired by Bank of America in 2007. The account became the agency's largest account by revenues, and my PR campaign became the company's model campaign for all of U.S. Trust's regional PR agencies nationwide.

I directed the PR account over the next 11 years, starting with one office in Connecticut to eventually winning the entire New England to Virginia regional PR business. It was at U.S. Trust where I learned the most about wealth management, financial literacy, and legacy planning. I worked closely with the CEOs and Chief Investment Officers -- some of the most brilliant, kind, and generous people I have ever had the privilege of working with. We are still friends today, 25 years later!

The one constant throughout my tenure at U.S. Trust's PR agency-of-record, was a woman named Allison Kellogg, then Managing Director of Marketing and PR at the firm. She was instrumental in our agency winning the additional geographic regional business.

Launched the PR Division of Creative Partners - 2002

In 2001, I was asked by Peter Schelfhauert, then CFO of Earle Palmer Brown, to help him launch a PR Division of Creative Partners, a company that he had bought as part of Earle Palmer Brown's portfolio of companies, and subsequently bought back, based in Stamford, Connecticut.

U.S. Trust became my first PR Division client. My team and I built the Creative Partners PR Division to \$1.25MM in revenues in five years, to one of the fastest growing PR firms in Southern Connecticut, and an "agency to watch."

Launched Burns Communications LLC -- 2007

I launched Burns Communications, LLC Brand, Business and Communications Strategy agency in 2007, a PR and brand marketing communications agency that I still run today -- celebrating 14 years this month! Soon after, launching, I won the Rockefeller & Co., Inc. account to launch its Rokit Solutions or RockIT, a provider of outsourced data aggregation and reporting solution software for family offices, investment advisors, and trust companies.

2020-2021 (see announcement news release)

For more than three decades, I have built a reputation as an effective financial and business mentor to individuals, entrepreneurs, families and retirees. I have built profitable six- and seven-figure companies and have established a proven track record as a successful private investor. I also served as an affluent marketing strategist to two of the world's most well respected wealth management companies, for U.S. Trust and Rockefeller & Co., Inc. as well as Rolls-Royce and Bentley Motor Cars, Inc.

Company Mission

At Literacy to Legacy Mentors, We Educate, Inspire and Motivate People to Master Their Financial Lives and Live Prosperously at Any Age Through Personal Finance Education and Mentoring.

My Mentors

I am launching Literacy to Legacy Mentors in homage to the mentors in my life:

Mom, Charlotte, who taught me about business, investing, saving, earning what I am worth, and helping those less fortunate.

Carol Walters, VP of PR at Max Factor Cosmetics who landed me my first job at Kerr Kelly Inc. PR agency – my first PR agency job.

Ian Kerr & Bob Kelly, founders, Kerr Kelly Thompson. Ian was a former BBC journalist and Bob Kelly was the former Deputy Press Secretary to President Ford. They taught me everything about the luxury marketing PR business, agency management, and client retention. I became a senior member of the management staff under their tutelage, helping them to run the agency.

My Mentors | Cont'd

Fred Thompson, President of Kerr Kelly Inc., President of the PR Division of Earle Palmer Brown, and President of the PR Division of Creative Partners. He was a constant source of encouragement, support, and taught me the ropes of big agency PR.

Peter Schelfhaudt, CEO, Creative Partners Advertising and PR Division. Peter taught me about PR and PR Division management.

Reg Abbiss, Head of Marketing and PR at Rolls-Royce & Bentley Motor Cars. Reg was instrumental in my learning about affluent marketing, and automotive marketing and PR.

David Albright my SCORE mentor. David was the former Global CEO of Godiva Chocolate. Over a period of four years, he helped me to reposition and rebrand my agency from a profitable PR focused company to a more profitable brand and business strategy consultancy.

Adam Pemberton, CEO, Echo Brand Group. Adam has been my strategic agency partner for the past 14 years, collaborating on and referring business to each other.

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