

Presenters

**Celina Ochoa, CFP®**

Wealth Advisor & Chief Compliance Officer | Haynie Wealth

Celina Ochoa, CFP®, is a Wealth Advisor and Chief Compliance Officer at Haynie Wealth Management. She specializes in tax-efficient financial planning strategies for individuals, families, and business owners, with a focus on retirement planning, estate planning, and long-term wealth preservation. Working closely with Haynie's tax professionals, Celina helps clients navigate financial decisions involving investments, charitable giving, business succession, and generational wealth transfer.

**Cassie Gonzalez, CPA**

Tax Manager | Haynie

Cassie Gonzalez, CPA, is a Tax Manager at Haynie and specializes in estate, gift, and trust taxation. She works with individuals, families, and business owners to navigate complex tax planning and compliance matters. Cassie joined the Dallas office in 2018 and became part of Haynie in 2021. She holds a Bachelor of Science in Accounting from The University of Texas at Dallas and is an active member of the AICPA and TXCPA.