ANAMARIS ORTIZ RODRÍGUEZ

DBA | **LA ALCANCÍA DE CRISTAL**

CAPABILITY STATEMENT

La Alcancía de Cristal is a woman-owned, Puerto Rico-based business dedicated to providing conscious finance education, mentoring, and consulting services. With a focus on financial well-being, self-knowledge, personal growth, and sustainability, we empower families, individuals, businesses, schools, and universities to achieve financial stability while aligning their financial decisions with their core values and personal goals. Established in 2019, we have helped numerous clients transform their relationship with money, combining practical financial strategies with emotional wellness and personal development.

CORE COMPETENCIES:

- **Conscious Finance Mentoring**: Tailored one-on-one mentoring for individuals and businesses to strengthen financial health and achieve measurable results.
- **Financial Education**: Strategic training and solutions focused on sustainable financial practices for long-term stability.
- **Workshops & Educational Services**: Customized workshops, seminars, and online courses on conscious budgeting, debt management, and financial empowerment through self-knowledge.
- **Leadership and Team Development**: Training programs for schools, universities, and organizations to integrate financial literacy and personal development into their culture.
- **Holistic Financial Wellness Coaching**: Comprehensive coaching that helps individuals balance financial decisions with overall well-being.
- **Management Consulting Services**: Support for organizations to improve financial management practices, strengthen operational strategies, and increase efficiency.

DIFFERENTIATORS:

- **WOSB and HUBZone Certified by SBA**
- **Proven Methodology:** "Happy Budget & LADC Method" aligns financial health with personal values.
- **Education Impact:** Delivered financial literacy programs to 2,000+ students.
- **Trusted Partnerships:** Strong collaboration with government agencies and nonprofits.
- **Social Impact:** Mentorship of youth and disadvantaged individuals fostering financial empowerment.
- **Bilingual & Culturally Competent Team:** Expertise in serving diverse communities, especially Hispanic-speaking populations.

NAICS CODES:

- **541611** (Administrative and General Management Consulting Services)
- **611430** (Professional and Management Development Training)
- **624190** (Other Individual and Family Services)
- **611710** (Educational Support Services)
- **541618** (Other Management Consulting Services)

PAST PERFORMANCE:

- EDP University, Hato Rey, PR – **Financial Literacy Workshop for Title V - Improving Students Achievements Through Academic and Support Programs PO31S210146**: Delivered a series of financial education workshops to incoming university students, empowering them to make informed financial decisions.

- **Corporate Financial Wellness Program:** Developed and implemented a financial wellness program for employees of both large and small corporations, improving their personal finance management, reducing financial stress, and introducing the Happy Budget Method for sustainable budgeting and financial growth.

- **Mentorship Program for Vulnerable Populations:** Provided financial education through seminars and workshops to vulnerable populations, such as youth from substitute homes (in collaboration with the Puerto Rico Department of Family Affairs) and women affected by economic violence. Empowered them to gain financial independence and responsibility while offering tools for overcoming financial challenges.

- **Published Author:** Ortiz-Rodríguez, A. has contributed articles to *Oh My Boomer Magazine* and *Pure and Healthy*, co-authored the book *El Amor y el Interés* (2024), which addresses financial violence, and developed and authored *M.O.M. - Money Over Myths* - (2025), designed to guide families in teaching financial literacy to their children.

- **El Amor y el Interés Events and Workshop at the Supreme Court of Puerto Rico**: Coordinated and presented the "*El Amor y el Interés*" workshop, highlighting economic violence and its impact on financial decisions, delivered at the Supreme Court of Puerto Rico to promote awareness and offer solutions for affected individuals.

ASG RUP 50512

THUNDERBIRD EXECUTIVE EDUCATION CERTIFICATE IN ENTREPRENEURIAL MENTORING

SBA U.S. Small Business Administration WOSB CERTIFIED

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