

# Peer Insights

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R E P O R T

## Q&A with Pam Krueger

### TV Personality & Founder of WealthRamp

#### Principle Series:

*Family Office Insights sits down with Pam Krueger, TV personality and founder of WealthRamp to discuss how she's leveraging her media career to further her personal mission to bring smart financial planning to 33 million mass affluent consumers using technology.*



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Family Office Insights is a voluntary, “opt-in” collaborative peer-to-peer community of single family offices, qualified investors and institutional investors.

*Learn more at:*  
[FamilyOfficeInsights.com](http://FamilyOfficeInsights.com)

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**Q:** You have a diverse background from finance to media. Can you tell us about how you got your start in business?

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**A:** My career as a stockbroker began when I was in my early 20s. I loved the investment world, but hated the business model being so commission-driven. I joined Schwab and helped them build their individual registered investor business for fee-based advisors that later grew into a multi-billion dollars. I always had a passion for educating consumers about investing, so when I was asked to participate on a television show to explain some simple investing 101 concepts, I was hooked.

**Q:** You launched a show on PBS known as *MoneyTrack*. Can you tell us more about that?

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**A:** Investor education became my passion. I raised \$6M from securities regulators who wanted a platform to share content and messages to help educate and protect investors—especially women. I created and launched *MoneyTrack* aimed at mass affluent consumers and the weekly series broadcast on 255 PBS stations across the country for three seasons. Ben Stein, John Bogle and others including Warren Buffett appeared on *MoneyTrack*.

Our show won dozens of awards and in 2009, I partnered with MSN Money and gained an additional 5 million viewers online. I authored my first book, *The MoneyTrack Method* as a companion to the show and I was doing interviews and segments regularly on ABC-TV, CBS, Fox & Friends, and many other talk shows.

**Q:** How did that lead to the idea of *WealthRamp*, your latest venture?

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**A:** It all came together after the financial crisis in 2012 when my co-host Jack Gallagher and I were out speaking at investor town hall meetings. We kept getting the same question over and over about financial advisors. People would say: “Pam and Jack, we love your show and the way you tell the truth about how fees and commissions really work, but we need to know where to go online to find qualified advisors who meet that criteria.” And in that moment, *WealthRamp* was born.

**Q:** Tell us about the new PBS show you are currently working on? When will it launch?

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**A:** We have a brand new one-hour special rolling out nationally beginning in late 2016 called, *MoneyTrack: Money for Life*. This is a pledge special that will help local PBS stations raise money. We will feature stories and interviews about how to make the money you’ve saved and earned to last the rest of your life in retirement in a zero interest rate environment. We will allow viewers to order special “How am I doing?” software-generated reports that will help them see for themselves how they can make their money last. We’ll also offer social security optimization

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reports. We'll give viewers the opportunity to meet with advisors who can help them understand how to input their data and then explain results from these reports. We plan to sell these reports via our matched advisors once WealthRamp is fully funded and up and running.

## Q: How important is it to hire the right team in terms of WealthRamp?

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A: I'm so fortunate. I have surrounded myself with experts and professionals who bring so much more than the sum of their parts. We have hired Deirdre Davi—the former Director of Marketing for Facebook—to head up marketing and brand positioning. We also have Peter Bordes who is the rocket fuel that will propel Deirdre's marketing strategies. Our CTO is incredible and has a background in artificial intelligence and cannot wait to get some of his creative ideas into motion— including helping consumers communicate with the advisors right on WealthRamp's platform.

## Q: What's next for you, your business and your PBS programming?

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A: WealthRamp is the most exciting opportunity I've ever seen. We are now 'wheels up' and it is going to take off! When we do reach cruising altitude, this will be a \$30M a year business and it won't even take three years to get there. I'll continue our PBS show *MoneyTrack* and it will become an incredible tool to leverage all of our social media and affiliate and media partnerships. The sky is the limit for both the show and for WealthRamp.

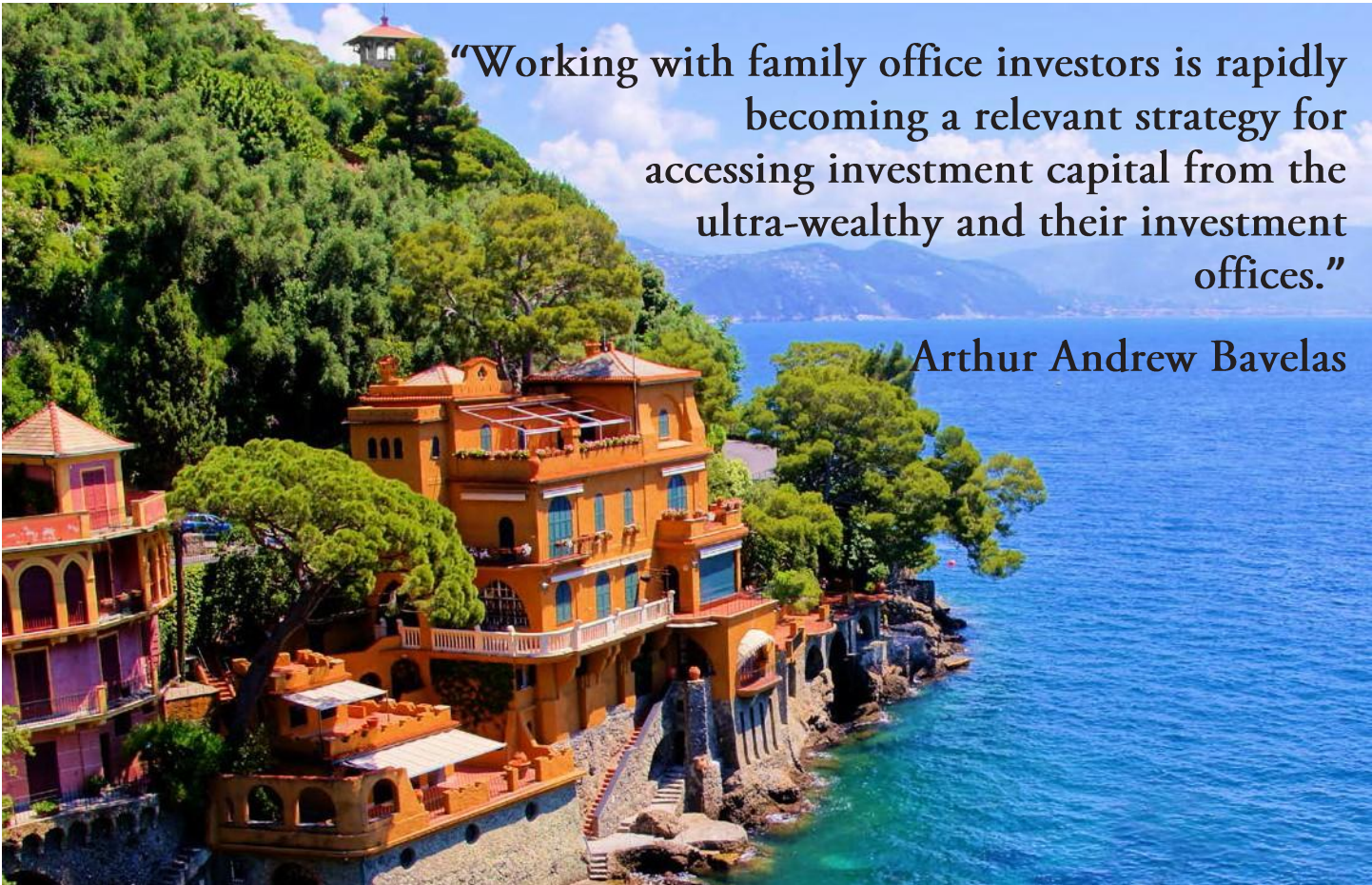


***Pam Krueger***

*Pam Krueger is a TV Personality, and Executive Producer of the award-winning investing series, MoneyTrack, on public television. Pam created the award-winning MoneyTrack investor education television series seen nationally on over 250 PBS stations. She is the recipient of a 2010 and 2009 Gracie Award and will roll out a brand new one-hour special in late on PBS educating the public about wealth management and retirement investing. Pam serves on the board of directors of the California Jump\$tart Coalition, an organization dedicated to increasing financial literacy among children and teens, and she received the Financial Educator of the Year Award in 2010 from the Financial Literacy Institute.*

*In 2014, Pam founded WealthRamp, a technology company that matches individual investors to the best-fit financial advisors. The idea for the service developed out of demand from Pam's audiences looking for an agnostic, user-friendly way to find and connect with qualified, vetted advisors. For more information, please visit <https://wealthramp.com> or contact Pam at [pam@wealthramp.com](mailto:pam@wealthramp.com).*

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**“Working with family office investors is rapidly becoming a relevant strategy for accessing investment capital from the ultra-wealthy and their investment offices.”**

**Arthur Andrew Bavelas**