



H. Jude Boudreaux, CFP®, founded Upperline Financial Planning in 2010 as a fee-only financial planning firm. The initial pricing structures and concepts of Upperline were based on The Planning Center, a fee-only financial planning firm headquartered in Moline, IL. As Upperline grew, the opportunity to merge with The Planning Center was presented and it was a natural fit to join not only professional colleagues, but personal friends from the Midwest.

The Planning Center's New Orleans office opened in 2017 when Upperline Financial Planning officially merged with The Planning Center. While our office specializes in working with physicians and those in the medical community, we have clients across all walks of life who are looking for a welcoming place to have important conversations about their financial life. Our primary goal as a firm is to work to preserve and enhance the financial well-being of our clients. Mr. Boudreaux's fee-only planning is highly personalized to deliver exceptional service for his clients. His services offer every aspect of financial planning, from cash flow and debt management, to sophisticated insurance and estate planning.

Mr. Boudreaux previously spent five years as the Director of Financial Planning at Bellingrath Wealth Management, after spending six years building a diversified finance career with two large financial institutions - Janus Mutual Funds and the MassMutual Financial Group. Mr. Boudreaux also served as Agency Supervisory Officer for the MassMutual Financial Group, further enhancing his background in the supervision of investment transactions and registered representatives.

Mr. Boudreaux is a CERTIFIED FINANCIAL PLANNER™ Practitioner, granted by the Certified Financial Planner Board of Standards and a Global Financial Planner, granted by the Global Financial Planning Institute. He holds a Bachelor of Business Administration in Finance from Loyola University New Orleans. Mr. Boudreaux is a member of the Financial Planning Association and served as the 2009 President of the FPA NexGen Community, a national consortium of young financial planners. He is also a member of the National Association of Professional Financial Advisors (NAPFA) - an organization of Fee-Only Financial Planners.

Mr. Boudreaux is a member of the adjunct faculty at Loyola University New Orleans where he teaches Personal Finance and Music Finance.

Mr. Boudreaux has served as an informational source and appeared in several publications including the [New York Times](#), [Wall Street Journal](#), [Journal of Financial Planning](#), [Financial Planning Magazine](#), [Financial Advisor Magazine](#), [InvestmentNews](#), and [Family Wealth Report](#), as well as online at Forbes, Yahoo Finance, and CNBC where he is a member of the CNBC Financial Advisor Council. He was honored as part of the InvestmentNews 40 under 40 class in 2015. He is a past member of the Loyola University Alumni Board, Past-President of the Loyola University College of Business Alumni Board, and has served as a mentor for the incoming freshmen of the College of Business. He was a member of the Young Leadership Council Board of Directors for 4 years and the Endowment Chair for 5 years. He is a graduate of the Committee for a Better New Orleans/Metropolitan Area Commission 2007 Metropolitan Leadership Forum, and was recognized as the 2008 Young Alumnus of the Year by Loyola University New Orleans' College of Business.

Mr. Boudreaux and his wife Karen enjoy spending time with family locally and in Chicago, as well as traveling. They reside in the Garden District in New Orleans, LA with their darling daughter Lucy and adorable son Charlie.

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