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BECAUSE YOUR GOALS ARE TOO IMPORTANT TO BE LEFT TO CHANCE!

During difficult times, addressing your financial objectives often seems like a daunting task. Realizing your goals and achieving financial independence requires careful planning. Because they are your goals, achieving them is too important to be left to chance.

I have been offering brokerage, insurance and retirement solutions since 2003. I am committed to helping my clients protect their income, grow their assets, and pass those assets to future generations. Having spent a major



part of my career directly involved in a family business, I have extensive experience in retirement and succession planning. As a financial planner, I work closely with my clients to gain an understanding of their personal goals before implementing any strategies.

I earned a Master of Science degree from the College of Financial Planning. I was also awarded the CERTIFIED FINANCIAL PLANNER™ (CFP®) certification from the Certified Financial Planner Board of Standards Inc. and the Accredited Wealth Management AdvisorSM (AWMA®) certification from the College for Financial Planning. I am currently a member of the Financial Planning Association, and hold licenses in life and health insurance in addition to FINRA Series 7 and 66 security licenses.

My business focus is on:

- Retirement Planning
- Investments
- Risk Management
- College Funding
- Estate Planning Strategies

I am married and have raised two children in New York City. During the past twenty five years, I have sat on the board of directors of the Sephardic Skilled Nursing and Rehabilitation Center, a 271 bed skilled nursing facility located in Brooklyn, NY. I have had the privilege of serving as that organization's President and Chairman of the Board.

Currently, I am serving as a member of the board of directors of the Sephardic Home for the Aged Foundation. This foundation was established as a not-for-profit corporation with the goal of aiding the elderly of our community. I chair the investment committee and sit on the finance committee. My charitable endeavors continue to be on a pro-bono basis.

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