

Welcome

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A Unique Wealth Management Firm

Rochester Financial Services was founded in 1993 to provide Fee-Only portfolio management and financial planning services. Owner Jeff Feldman has been recognized as a **Rochester Business Journal** Top 25 Money Manager. He specializes in No-Load mutual fund investments. Approximately \$230 million of client assets are currently under management. Jeff is one of Rochester's only members of NAPFA, the association of Fee-Only financial advisors (FeeOnly.org).



**Rochester Business Journal Top 25 Money
Manager For 10 Consecutive Years, 2010-2019**

**Registered Investment Advisor with
the US Securities & Exchange Commission**

(SEC Disclosure Form with Fee Schedule Included)

Who is Jeff Feldman?

In addition to being a member of NAPFA, Jeff is a member of the National Association of Tax Professionals. He is a licensed Certified Financial Planner, a Ph.D. from the University of Rochester, and an SEC Registered Investment Advisor. He has been quoted in national financial publications such as the **Wall Street Journal**, **Business Week**, **Kiplingers**, **Newsweek**, the **Motley Fool** and **Smart Money**.

[Jeff's Nov. 1, 2016 Interview on Wharton School Business Radio](#) *(click on Download)*

[Jeff's Sept. 2, 2014 Interview on Wharton School Business Radio](#) *(click on Download)*

[Jeff's Feb. 3, 2015 Interview on Wharton School Business Radio](#) *(click on Download)*

Jeff's Quotes in the News

[Wall Street Journal \(9/15/14\) - Advisors Not Raising Cash](#)

[USA Today \(11/17/12\) - Money Watch: Making Your Retirement Nest Egg Last](#)

[Wall Street Journal \(10/5/12\) - Time to Trash "Junk" Bonds?](#)

[Against Indexed Annuities](#)

[Why Converting to a Roth IRA is a Mistake \(FiGuide.com\)](#)

[Wall Street Journal Article - Investing in Bond Funds](#)

[Wall Street Journal Article - Trouble Lurks in 'Junk' Bonds](#)

[Smart Money - Investing in Japan](#)

An Independent Financial Consultant Offering Objective, Unbiased Financial Advice

