

**DESIGNATIONS AND
EXPERIENCE**

- Designations** CFP®: CERTIFIED FINANCIAL PLANNER™ Professional
CPWA®: CERTIFIED PRIVATE WEALTH ADVISOR
AIF®: ACCREDITED INVESTMENT FIDUCIARY
- Prior Experience** Financial Consultant, Sovereign Bank 2002-2005
Provided Investment Management for high net worth clients
- Speaker** Led Focus session at Million Dollar Round Table, Toronto, Canada
“Retirement Planning Tools for Baby Boomers”
Led Focus session at Million Dollar Round Table, Atlanta, GA
“Practice Management ideas for Investment Advisors”
Signator Investors, Inc. Practice Advancement Conference, Orlando, FL
Main platform presentation on practice management and client service.

**MEMBERSHIPS AND
INVOLVEMENT**

- Member** National Association of Insurance and Financial Advisors [NAIFA]
Million Dollar Round Table [MDRT], Top of the Table
Financial Services Institute
Boston Estate Planning Council
Financial Planning Association
Sudbury Chamber of Commerce
- Charitable** Trustee, MDRT Foundation, 2018-2021
Chairman, MDRT Foundation Grants Committee, 2017
Big Brother of Mass Bay

EDUCATION

Franklin and Marshall College, B.A.
Boston University, Certificate in Financial Planning [CFP®]

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