Over twenty years experience planning for HNW clients, family real estate enterprises, business owners, professionals, corporate executives, and retirees. Estate planning, tax planning, succession planning, investment advisory services, insurance advisory services, wealth transfer, generational transfer planning, captive insurance, and ESOPs. Very strong technical, interpersonal and client relationship management skills.

Specialties: MBA-Finance, Certified Public Accountant (CPA), Certified Financial Planner (CFP), CA life insurance license