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Professional Experience

Goldstein Financial Future, Dallas, TX
June 2003 – Present
Principal

Achievements:

- Built a fee-only practice from the ground up to roughly 180 clients served.
- Served 25 families in 2011 on either focused issues or comprehensive plans.
- Presented two Case Studies at the National Association of Personal Financial Advisors (NAPFA).
- Authored a monthly column in White Rock Lake Weekly.

Capabilities:

- Cash Flow Planning: budgeting, debt reduction, financial aid and college saving
- Estate Planning: Will and beneficiary designation reviews, review of Powers and HIPAA, and estate tax liability analysis
- Investments: asset allocation and risk analysis
- Employee Benefits/Retirement Planning: heath care cost analysis, cash flow in retirement, 401(k) and IRA investing
- Risk Management: life insurance reviews, Long Term Care analysis
- Tax Planning: tax liability reductions, tax law education
- QuickBooks training and setup
- Charitable Planning: strategizing giving plans and tool selection

JP Morgan Chase, Dallas, TX
1999 – 2002
Trust Administrator

Achievements:

- Managed 115 Irrevocable Life Insurance Trusts.
- Introduced Financial Planning into the Personal Trust Department.

Capabilities:

- Assisted in the day to day operation of approximately 250 trust accounts.
- Created cash flow analyses, asset allocations, estate plans, and trust simulations using NaviPlan software.
- Drove risk management projects including: auditing all life insurance policies statewide and account profiling.

Education

The American College, Bryn Mawr, PA
Chartered Advisor in Philanthropy (CAP) — Completed 2 of 3 grad. level courses

University of Texas, Arlington, TX
Master of Business Administration, Finance — Graduated 1999

Washington University, St. Louis, MO
Bachelor of Science, Psychology — Graduated 1993