

Michelle Brodsky Goldstein

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Professional Experience

Goldstein Financial Future, Dallas, TX

June 2002 - Present

Principal

Achievements:

- Built practice from ground up to its current level of 150+ clients
- Presented Case Study at the National Association of Personal Financial Advisors Conference (NAPFA)
- Authored a monthly column in White Rock Lake Weekly

Responsibilities:

- Cash Flow Planning: budgeting, debt reduction, college planning
- Estate Planning: Will and beneficiary designation reviews, estate tax liability analysis
- Investments: asset allocation and risk analysis
- Employee Benefits/Retirement Planning: 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, setup and execution
- NaviPlan training and consulting

JP Morgan Chase, Dallas, TX

1999 - 2002

Trust Administrator

Achievements:

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

Responsibilities:

- 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

University of Texas, Arlington TX

Master of Business Administration, Finance

Graduated 1999

Washington University, St. Louis, MO

Bachelor of Science, Psychology

Graduated 1993

References

References are available only upon request.