

## **Professional Experience**

Goldstein Financial Future, Dallas, TX June 2003 – Present

### **Principal**

#### **Achievements:**

- Clients served - 250
- Built a fee-only practice from the ground up to roughly 180 clients served.
- Served 30 families in 2017 on either focused issues or comprehensive plans. Presented two Case Studies at the National Association of Personal Financial Advisors (NAPFA).
- Provide training on financial topics for employees and companies such as: Bank of America, City of University Park, Loreal, Farmers Insurance, Cook Children's Hospital.

#### **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: health 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.

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**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**