BARRY RABINOWITZ

Barry Rabinowitz, CFP®,MBA, EA., has over 20 years of experience working with individuals and couples. He specializes in financial planning for professionals and retirees, and helping them achieve their financial goals and objectives through proper financial planning and risk management.
Whether you are interested in growing and protecting your assets, ensuring your lifestyle in case of disability, protecting your loved ones in case of premature death, or tax and retirement planning strategies, he can help you.

Barry's business model is "fee only" financial planning. That way he can be 100% objective in his analysis and recommendations.

Barry believes that education is vital in the Insurance and Investment Industry and he has the following credentials: Certified Financial Planner (CFP), has a Masters degree in Finance (MBA), is an IRS Enrolled Agent (EA), and is a NASD industry arbitrator.
As a CFP®, he is legally obligated to act as a Fiduciary, and must consider what is in the client's best interest at all times.

In addition, he is an educator. He has taught financial planning courses at various colleges both in NYC and here in South Florida. He is also on the Board of Directors, Financial Planning Association, Gold Coast Chapter, Palm Beach County.
He has been widely quoted by the press, ie., Sun-Sentinnel and the Palm Beach Post, on financial planning, investments and insurance issues. In January, 2009, he was a featured speaker at a Practitioner Conference at the Boca Raton Resort and Hotel on the tax efficiency of Exchange Traded Funds (ETF's).
Barry also believes in giving back to the community and does much "pro-bono work.
He has helped reservists headed to Iraq, and has been a participant in many financial planning clinics hosted by the Certified Financial Planner Board.

Barry holds the Florida #215 license, which allows him to help his clients in the areas of Life, Long Term Care, and Variable Annuities. In addition, he holds the Series 7 and 63 licenses with the NASD, which allows him to help his clients with investing in stocks, bonds, and mutual funds. Barry is an Investment Advisor Representative, which enables him to offer fee based portfolio and investment services. All clients' portfolios are based on their financial goals and objectives, risk tolerances and the proper asset allocation.

Mission Statement: A successful financial plan begins with a thorough understanding and analysis of a clients' financial goals and objectives, risk tolerances and what
they aspire to leave as a legacy. I will always keep the welfare and peace of mind of my clients as the centerpiece of my financial planning advice.