



Corporate Resume

Corporate Designations

Dalbar, ISO 9001:2000 Certification, Bill Good Certified, FINRA, RIA, SEC,

Individual Designations

CFA, CFP, CTFA, ChFC, CLTC, CHC CCPS, JD, L&H, P&C, CLU, CHHA, MBA, GE Six Sigma

Past Employment

Merrill Lynch, Smith Barney, Equitable, Ford Financial Group, Wachovia, Key Private Bank, Citigroup, Motivational Marketing, Horizon BCBS, Empire BCBS, HealthNet, Oxford Health Care, Prudential, The Hartford, Vital Signs Inc, Mid-Atlantic, Franklin Life, Cigna, Northwest National Life, Mass Mutual, USI Insurance Services, HRH, The NIA Group, Segal, C&B Consulting Group, GE, Thomson, Minabea, SKF, Charging Rhino

Education

Bates College, Columbia University, Binghamton University, Denison University, New York Law, Notre Dame, Rutgers, Seton Hall, Smith College, University of Nebraska, Villanova, Long Island University, Worcester Polytechnic Institute

Degrees

Business, Business Administration, Communications, Economics, Finance, Human Development, Math, Materials Engineering, Mechanical Engineering, Political Science, Marketing, GE Research Technology Program, GE Manufacturing Leadership Program

Licenses

6, 7, 24, 31, 63, 65, 66, L&H, P&C, VA