Financial Therapist Network Listing

Contact Information

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RTD Financial Advisors

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Professional Services	Financial counseling
Practice Approach	Initially- financial planning discovery to understand what is important to the client and what provides meaning to their life (lives). Ongoing counsel and guidance to implement and monitor the planning and progress, typically meeting clients 3 to 4 times per year. Utilize communication tools to improve the satisfaction of financial and relationship decision making. We are a fiduciary with no conflicts of interest.
Client Focus	Individuals and couples
Typical Client Profile	-High income couples organizing their financial lives for long term investment and savings. -Individuals and couples contemplating a transition to retirement and using their asset accumulation for future lifestyle support in a tax efficient way. -Investment net worth in excess of $1 million. Those faced with balancing their own financial aspirations and the financial support needs of their extended family members.
Licenses/Certifications/ Designations	Master in Taxation, Certified Financial Planner™
Education	Case Western Reserve University, Chemical Engineering major, economics, minor. Villanova Law School – Master in Taxation; Estate Planning certificate.
Fee Structure	Fee only- retainer from the client. No commissions or sales of any product accepted.
Years in Practice	30
Professional Association Affiliations	Financial Therapy Association, National Association of Personal Financial Advisors, Financial Planning Association, Collaborative Law Professionals of Southeastern Pennsylvania
Do you work *at a distance* such as with Skype?	Yes. We conveniently arrange for video and/or audio meetings with our clients. Our website offers a facility to create an online meeting from any location. We prefer in person meetings as often as practical, and will travel to meet with clients and their families.
Research Interests	Financial decision making and its influence on life satisfaction; couple's communication around money issues

Personal Statement

Clients want to have a great life. My observation is that the highest degree of client success and life satisfaction results from having an ongoing engagement with a financial advisor. We create a safe environment for communication free of conflicts to promote supportive conversations. Our discovery focuses on what is important to the client and what provides meaning in their lives. With counseling, clients can improve their financial decision making together.

The client experience is enhanced with our emphasis on communication and regular meetings. Our team of credentialed professionals provides the technical support that complements my individual counseling on key decisions related to estate distribution, current and lifelong lifestyle support, investment management, and income tax minimization for an individual, couples, and multi-generational families.