ANDREW BARON, CFP®, EA

Associate Advisor

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EDUCATION

University of Rochester, BA 2012

American College of Financial Planning, 2017

Certified Financial Planner (CFP®)

IRS Enrolled Egent (EA)

ABOUT

After graduating from the University of Rochester, Andrew entered the field of personal wealth management. He previously worked at brokerage firms serving a wide array of clients of differing backgrounds and provided guidance on retirement, investments, and insurance. As a lifelong learner, Andrew attained his Certified Financial Planner™ designation in 2017 and his Enrolled Agent credential through the IRS in 2020.

Currently, Andrew focuses his attention on dentists, and helping to establish a smooth transition into retirement. Looking to do more than "just" wealth management, he helps coordinate taxes with investments, and provides objective guidance on other pieces of the bigger financial picture.

CONCENTRATIONS

Retirement Spending Strategies
Business Exit and Succession
Investments
Insurance Review
Tax Planning

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