ANDREW BARON, CFP®

Associate Advisor

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EDUCATION

University of Rochester, BA 2012

American College of Financial Planning, 2017

Certified Financial Planner (CFP®)

Enrolled Agent (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.

In addition to coordinating investments with tax optimization, Andrew is always looking for new ways to assist clients in establishing a strong financial foundation. He achieves this through objective guidance and hands-on implementation with other professionals to ensure the client's best interest is always the premier focus.

CONCENTRATIONS

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

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