Southern Berkshire Chamber

In the Spotlight…

Mission – To bring my investment, actuarial, business and educational experience to bear for the benefit of individuals, families and small businesses looking for independent, unbiased, fee-based financial planning and/or investment management expertise.

Background – Following 36 years as a consulting actuary to some of the largest public and private employers in the United States, I took advantage of my experience to begin a second career as a financial planner, investment manager and, more recently, as an adjunct professor in finance and economics at UAlbany (SUNY), SUNY New Paltz and The College of St. Rose.

Blueprint for Success – To utilize my actuarial and investment management expertise to provide outstanding quality financial services. As an actuary, I am extremely qualified to assess variable annuities and other insurance and financial products and, since I do not sell insurance or financial products of any kind nor do I work for a firm that does, I can offer completely independent and unbiased advice. As a sole practitioner, my practice is limited to those clients who I can serve on a personalized basis.

Contact Information –

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