WPAG Senior Advisor

Advisory Experience

More than 23 years of experience as a financial advisor, including:

2004 - Present

Senior Advisor, WPAG, Bedminster, NJ

1990 - 2004

- Senior Financial Advisor, American Express Financial Advisors, Inc., Bridgewater, NJ
- Consistent top producer. Industry and inhouse award winner. National guest speaker.
 Producer. Earned Senior Financial Advisor status.

Business Experience

1986 - 1990

 Controller, Proteus Technology Corporation, Hasbrouck Heights, NJ

Professional Associations

- Society of Financial Services Professionals
- Financial Planning Association
- Advisors in Philanthropy
- MDRT Qualifying Member since 1999
- MDRT 2 Court of the Table Member qualifier
- MDRT 7 Top of the Table Member qualifier
- Forum 400 Qualifying Member since 2010

Personal

Enjoys reading, traveling, playing and watching basketball.

Designations and Degrees

- Chartered Advisor in Philanthropy®, 2011
- Chartered Life Underwriter®, 2000
- Chartered Financial Consultant®, 1997
- Certified Financial Planner®, 1993
- MBA in Finance, 1986
 Eastern Illinois University Charleston, IL
- Bachelor's of Commerce, 1981
 Accounting and Finance
 University of Bombay, India

Community Service

- Hindu Temple & Cultural Society Chairperson Fund Raising Bridgewater, NJ
- Somerset Valley YMCA
 Executive Board Member
 Somerset County, NJ

Contact Information

Wealth Planning Advisory Group **Toll Free:** 1 (888) 757-9362

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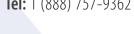
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