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- Bachelor of Arts Degree in Mathematics
- CLU - Charter Life Underwriter
- ChFC - Chartered Financial Consultant
- MSFS - Master of Science and Financial Services, emphasis on executive/owner compensation and estate tax
- AEP - Accredited Estate Planner
- Founded IRUS in 1983
- Member of Philadelphia Estate Planning Counsel
- 37 Years of experience in the insurance, benefits, and financial services industry
- Principal of IRUS Advisory, a Registered Investment Advisor
- Registered Representative with The Leaders Group
- Member of Legacy, Boston and Pinnacle Equity Solutions

"FINANCIAL CONCIERGE"

Providing personalized strategies and tactics to enhance all aspects of your business and personal lifecycles:

- Life Stage Planning
 - Financial and Tax Planning
 - Retirement Planning
 - Estate and Legacy Planning
 - Portfolio Allocation and Asset Risk Assessment
 - Executive Compensation Strategies
 - Owner and Key Executive Plans
 - Merger and Acquisition Analysis/Implementation
 - Succession and Exit Strategies
- Negotiated oil and gas lease resulting in a \$135,000 tax savings and an increase in the initial lease payment of \$175,000 to benefit the owner.
- Developed, Coordinated and Maintained strategic plans for multigenerational family enterprise to allow for continuity and legacy planning, increased communication strategies, tax benefits, finance options and creation of various holding entities to minimize risk and enhance governance.
- Coordinated the strategic and legal team to implement a \$33M buyout of privately held company to a publicly traded entity
- Orchestrated and implemented a management buyout of a \$20M organization.
- Assisted the North America headquarters of a major European Corporation to understand and consolidate the benefits of their various North American locations and continue to advise them, particularly in regard to their retirement plans.
- Coordinated and facilitated the processing of a major construction loan for a new commercial building in the City of Philadelphia, working with the borrowers, lenders, attorneys, insurance vendors, and general contractor, to assist and advise with the leasing negotiations, as well as commercial renter clients, on an ongoing basis.

Securities offered through The Leaders Group. Member [FINRA](#) & [SIPC](#). Investment Advisory Services offered through IRUS Advisory. The Leaders Group is not affiliated with IRUS Corporation or IRUS Advisory. IRUS Advisory offers securities in the following states: PA and NJ.

