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New Certified Family Business Specialist in Glastonbury helps local businesses with financial, retirement and estate planning considerations

Glastonbury, CT September 4, 2018 Nelson J. Rodriguez, a financial professional with Barnum Financial Group in Glastonbury, a general agency of Massachusetts Mutual Life Insurance Company's (MassMutual), has earned the Certified Family Business Specialist (CFBS®) designation. The CFBS® designation is offered solely for MassMutual financial professionals through a rigorous educational program at The American College in Bryn Mawr, Pa.

The CFBS® designation places Mr. Rodriguez in a select class of financial professionals tailored to the needs of family-owned and closely-held businesses, such as:

- Financial issues regarding succession, retirement and estate planning
- Tax and financial considerations in transitioning a business
- Benefit plans to help attract and retain qualified talent in closely-held businesses

Research shows that business owners spend a majority of their time working <u>in</u> their businesses and not <u>on</u> their businesses as evidenced by how few have documented plans in place to protect their businesses from the unexpected.[1]

"Family and closely-held businesses have unique dynamics when it comes to financial considerations, including succession and retirement planning," said Paul Blanco, Founder and CEO of Barnum Financial Group. "The CFBS® designation is regarded as a significant professional milestone, reflecting a commitment to business owners and their financial needs."

In addition to the CFBS® designation, Nelson also holds an MBA degree in business management from the University of Phoenix and a B.S. in finance degree from Fordham University. He is a member of the Hartford Foundation for Public Giving's Professional Advisory Committee, a Trustee for the Hartford Seminary and The Fund for Greater Hartford as well as a Board Member of International Hartford.

About Barnum

We help over quarter million clients, nationwide create wealth and make smart money decisions through our financial planning and consulting services. At Barnum Financial Group, we provide a full range of investment and risk management products and services to individuals and their families, as well as small businesses, corporations, government entities, and not-for-profit organizations and their employees in all fifty states. www.barnumfinancialgroup.com.

[1]MassMutual's 2015 Business Owner Perspective Study – Insights From America's Economic Engine