



*President/Founder*

### Practice Focus

- ♦ Retirement Planning
- ♦ Retirement Distribution Planning
- ♦ Pre-retirement Planning
- ♦ Comprehensive Wealth Planning
- ♦ Tax Planning
- ♦ Education Funding Planning

### Certification/Education

- ♦ BS, Business Administration LaSalle College
- ♦ Registered Financial Consultant
- ♦ Certified Wealth Strategist
- ♦ Certified Funds Specialist

### Affiliations

- ♦ International Association of Registered Financial Consultant (IARFC)
- ♦ Registered Representative and Investment Advisory Representative of First Allied Securities, Inc.
- ♦ Montgomery Co. Estate Planning Council

**Michael L. Schwartz, RFC®, CWS®, CFS**



## Michael L. Schwartz, RFC®, CWS®, CFS

Michael Schwartz founded Schwartz Financial Services in 1984 after only 7 years in the financial services industry. He continues to be dedicated in creating, growing, managing and preserving the wealth of his clients for over 30 years. Advisees ranging from professionals and executives to self-employed businessmen and families rely on Michael to develop financial strategies for Retirement Planning, Retirement Distribution Planning and College Funding.

Since losing his father at the age of 7, Michael learned early in life the need to be prepared for events that appear without warning. This has given him a solid grounding in helping others focus on preparation for life's sometimes catastrophic situations.

A strong client relationship is Michael's forte. He excels at developing unique, customized approaches for his clients; strategically crafting a plan for each client based on individual values, objectives and goals.

Michael has successfully completed the requirements to become a Registered Financial Consultant (RFC), Certified Wealth Strategist (CWS) and a Certified Funds Specialist (CFS) and stays current with the continuing education requirements for each designation.

To provide his investment clients with timely education on financial matters, Michael sends a weekly "Market Commentary" and a monthly "Lifestyles Newsletter." He also hosts quarterly "Client Education Workshops."

A resident of Holland, PA, Michael devotes his free time to his wife and two children; and enjoys a wide range of sports and recreational activities.

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Michael L. Schwartz, RFC®, CWS®, CFS offers securities through First Allied Securities, Inc. (Member FINRA-SIPC)  
A Registered Broker Dealer and advisory services through First Allied Advisory Services, Inc. A Registered Investment Advisor.