Profile of **JOHN A. QUATRINI**

- **B. A. and M.A. Degrees - Temple University**
- **Extensive Ph.D. Studies (ABD) - Temple Univ. & Univ. of Pa.**
- **Financial Practice <u>focused on *Comprehensive* Retirement Planning:</u> General Securities Principal; IAR (Investment Advisor Representative).**
- **Over 30 years Investment Experience & Research Intensive.**
- **Resident of Upper Moreland since 1977**
- **President of <u>*SOS*</u> and Regional Director for <u>Cetera Financial Specialists LLC</u>**
- **Named a "5 Star *Select Wealth Manager in 2009 and 2012 in Philadelphia Area"* by Philadelphia Magazine –only 3% of Advisors In area so honored.**
- **Active in Bux/Mont Chamber of Commerce, Professional Referral Network, President of Gloria Dei Endowment Board, and Volunteers of America.**
- **15 years management, training, consulting, and marketing experience**
- **Sought-after Seminar Leader and Speaker on Asset Protection and Tax Reduction, Estate Planning, Alternative investments, and more.**
- **Author of "*How to Get Higher Income from your Stocks", "A Senior Guide: Strategies to Protect your nest egg from Long Term Care Expenses", "How to Buy Stocks at a Discount, or get paid for Trying", and numerous articles.***

How Can I Help <u>YOU</u> Achieve Your Financial Goals?

A brief story might provide an answer. While in graduate school and working full time, an investment was highly recommended to me. It proceeded to lose most of its value. I was determined to figure out "why" and became a "student of the market", reading dozens of books and countless newsletters, and refining my growing skills with active investing…

I never did "figure out" the market (if anyone did, they'd potentially corner much of the investment world's assets!). However, I did learn what it takes to evaluate investments.

Today, I specialize in retirement/ estate planning, and asset protection . I also work with and mentor CPAs and accountants who've added investment services to their tax practices.

I've become a trusted advisor for my clients and their families. They recognize that my top priority is <u>their</u> financial well being. They know I'll tell them what I really think, not just what's expedient. Why do I do this?

Simply because I value **long term relationships,** and the best way to insure that is to ***put my clients' needs first.***

I invite you to contact me for a complimentary consultation, "financial check up", or 2nd opinion: **215-674-4456,** **JQ4U@yahoo.com;** Cell:215-869-0057. You'll find the process interesting and valuable, with NO hype or pressure. Plus, I'll provide you with a 4 page, professionally developed <u>Living Will</u> at no charge.

John A. Quatrini