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Robert S. Epstein, ChFC®

Robert brings a solid business background to the clients he serves at Access Wealth Planning. He is a valuable asset, working closely with his clients and in conjunction with each planner to put together tailored financial plans. Robert is skilled at developing plans that are effective and comprehensive, yet easy for clients to review and understand.

Robert enjoys teaching and recently co-taught a five-session estate planning seminar at the Hamilton Adult School. He also contributes to the firm's two newsletters, *Financial Advice for the Baby Boomer* and *The Advisor*, writing on a variety of financial topics that are relevant to the firm's client base.

Prior to joining the firm in 2006, he held a variety of corporate positions that provided him with the expertise he shares with clients and Access Wealth Planning today. Robert served as Director of Information Systems and then Director of Production for a large corporation. He then owned his own manufacturing business, which he ran for five years before deciding that the financial services industry was where he could make the most difference in people's businesses and lives.

In 2015, Robert attained the Chartered Financial Consultant (ChFC®) designation through The American College. This rigorous program addresses a wide variety of current topics such as: behavioral finance, special needs planning, small busines planning, financial planning for clients in the LGBT community, financial planning for divorce, and much more. He also holds a Bachelor's degree in History from the City College of New York.