Andrés M. Romero, ChFC, CFP®

Speaker's Packet

678-664-9745
andres.romero@e2efinancial.com
www.e2efinancial.com

Securities offered through LPL Financial, member FINRA/SIPC. Investment advice offered through Independent Financial Partners (IFP), a registered investment adviser. E2E Financial, LLC and Independent Financial Partners are separate entities from LPL Financial

Andrés M. Romero, ChFC, CFP®
Personal CFO

- Member of The Academy of Dental Management Consultants (ADMC) since 2005
- ADMC National Meeting, Presenter
- Schwartz Consulting's Dental CEO Success Seminar, Speaker
- Speaker at various dental schools & dental study clubs
- Atlanta Magazine's 5 Star Wealth Manager*
- Graduate of Boston College Bachelor of Science, Major - Finance
- Member of the Financial Planning Association & Board of Directors Emeritus (Georgia Chapter)
- Founded independent financial planning practice,

Andrés has been advising clients and their families since 1993. E2E serves dentists, doctors and women in life transition as their Personal CFO. E2E focuses on financial planning, investment planning, estate planning, benefits planning and succession planning needs.

Andrés has been interviewed on financial topics by *The Atlanta Journal Constitution*, Bloomberg Radio, and Channel 2 WSB-TV. Andrés has also published financial planning articles in *Dentist's Money Digest*. Andrés has been featured on *A Step Above*, the audio newsletter of the Academy of Dental Management Consultants (ADMC).

Presentation Topics:

- What Do Profit & Loss Statements Have To Do With It?
- How does the Tax Cuts and Jobs Act of 2017 affect me?
- Maximizing Your 401k Now!
- Key Tax Savings Strategies You Can Implement Now

2019 Presentation Dates:

- The Revenue Pie: How to Keep a Bigger Slice
  June 14, 2019
  Atlanta, GA
- Women in Life Transition: Being the Best You!
  Date TBA
  Webinar Series

Previous Presentations:

- Schwartz Consulting Group Dental CEO Success Team Seminar
  November 2017, 2018
- ADMC Speaker National Meeting
  2007, 2018
- ADMC Educational Series Webinar
  July 25, 2018
- Hinman Dental Meeting (table clinician) 2005-2007

5555 Glenridge Connector • Ste 200 • Atlanta, Georgia 30342 • Direct: 678-664-9745 • Fax: 404-793-0377 • andres.romero@e2efinancial.com
www.e2efinancial.com

Securities offered through LPL Financial, member FINRA/SIPC. Investment advice offered through Independent Financial Partners (IFP), a registered investment adviser. E2E Financial, LLC and Independent Financial Partners are separate entities from LPL Financial