Palisades Hudson Financial Group LLC

Fort Lauderdale, FL • Stamford, CT • Atlanta, GA • Portland, OR • Austin, TX

Comprehensive, Objective, Fee-Only Advice and Solutions

Our Mission

We strive to provide impartial information and advice that promotes our clients' financial security, the well-being of their loved ones, the satisfaction of their legal obligations, and the achievement of their philanthropic goals.

At A Glance

- Palisades Hudson provides financial planning services to professionals, athletes, entertainers, senior corporate executives, closely held businesses and high-net-worth families across the United States and abroad.
- Assets under management: over $1.2 billion
- Total client relationships: approximately 240
- Number of employees: 26
- Certified Financial Planners™: 10
- Certified Public Accountants: 3
- Enrolled Agents: 7

Core Capabilities

- Asset allocation
- Investment management
- Estate planning
- Retirement planning
- Tax preparation
- Executive financial planning
- Business valuation
- Business management
- Financial reporting
- Insurance consulting
- Cross-border tax planning
- Trust planning
- Bookkeeping and bill pay
- 401(k) advisory services

Why Palisades Hudson?

- Holistic approach that takes into account a full range of financial issues
- Objective, unbiased advice
- Personalized attention and customized solutions
- Lasting relationships with clients and their families
- Fair and transparent fee schedule provided in advance
- Compensated solely by clients
- Knowledgeable and accessible staff
- Access to institutional quality investment managers

Background

- Founded in 1992 by Larry Elkin.
- Registered investment advisor affiliate, Palisades Hudson Asset Management, launched in 1997.
- Fort Lauderdale office established in 2005.
- Atlanta office opened in 2008.
- Portland office opened in 2012.
- Austin office opened in 2015.

Management Team

Larry M. Elkin, CPA, CFP®
President & Founder
Shomari Hearn, CFP®, EA
Managing Vice President & Chief Compliance Officer
Linda F. Elkin
Director of Marketing & Human Resources
Paul Jacobs, CFP®, EA
Vice President & Chief Investment Officer
Eric Meermann, CFP®, CVA, EA
Vice President
Anthony Criscuolo, CFP®, EA
Client Service Manager
ReKeithen Miller, CFP®, EA
Client Service Manager
Rebecca Pavese, CPA
Client Service Manager
Benjamin Sullivan, CFP®, EA
Client Service Manager
David Walters, CPA, CFP®
Client Service Manager
Melinda Kibler, CFP®, EA
Client Service Manager
Thomas Walsh, CFP®
Client Service Manager
Pascale Leon-Bocchino
Administrative Manager
Jeffrey J. Howard
Administrative Manager
Melissa DiNapoli
Administrative Manager
Amy Laburda
Administrative Manager
Cristina Galante
Administrative Manager
Stephen Grady III
Financial Planning Manager
Kirstie Ward
Financial Planning Manager