

# Palisades Hudson Financial Group LLC

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

## 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 billion
- Total client relationships: approximately 240
- Number of employees: 25
- Certified Financial Planners<sup>TM</sup>: 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.
- Miami office opened in 2019.

### Management Team

**Larry M. Elkin, CPA, CFP®**  
*President & Founder*

**Shomari Hearn, CFP®, EA**  
*Managing Vice President*

**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**  
*Chief Compliance Officer*