

Palisades Hudson Financial Group LLC

Fort Lauderdale, FL • Stamford, CT • Atlanta, GA • Hillsboro, 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 \$1.3 billion
- Total client relationships: approximately 240
- Number of employees: 29
- Certified Financial PlannersTM: 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.
- Georgia office opened in 2008.
- Oregon office opened in 2012.
- Texas office opened in 2015.
- Miami office opened in 2019.

Management Team

Larry M. Elkin, CPA, CFP®

President & Founder

Shomari Hearn, CFP®, EA

Executive Vice President

Chief Operating Officer

Linda F. Elkin

Director of Marketing &

Human Resources

Paul Jacobs, CFP®, EA

Managing Vice President

Eric Meermann, CFP®, CVA, EA

Vice President

David Walters, CPA, CFP®

Vice President

Jeffrey J. Howard

Director of Technology

Anthony Criscuolo, CFP®, EA

Senior Client Service Manager

Chief Investment Officer

ReKeithen Miller, CFP®, EA

Senior Client Service Manager

Rebecca Pavese, CPA

Senior Client Service Manager

Benjamin Sullivan, CFP®, EA

Senior Client Service Manager

Melinda Kibler, CFP®, EA

Senior Client Service Manager

Thomas Walsh, CFP®

Senior Client Service Manager

Pascale Leon-Bocchino

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

Ashley Luhmann

Financial Planning Manager