

ALAN KIRSCHENBAUM, CFP®

Background

Born on September 25, 1972. Grew up on Long Island in Great Neck, NY. I married my wife, Dawn in 2007, we have three children, one son and two daughters and currently live in Delray Beach.

Education & Designations

Graduated Lynn University in May 1994 with a B.S. in B A
Received my Certified Financial Planner designation in April 2004
Series 7, 63, Life, Health and Variable Annuity

Professional

Entered securities industry 1996. Currently manage fee based investment advisory business for individuals and small businesses. Handle all aspects of investment portfolio development, research and monitoring. Personally handle client appointments and development of comprehensive financial plans. This involves reviewing all areas of a client's financial landscape consisting of Estate Planning, Insurances, Taxes and Retirement accounts. Managing my practice as an independent financial advisor allows me to put my clients needs first virtually without any conflicts of interest. American Portfolios does not manufacture product, hold inventory of product or compensate me differently based on the products and services I provide my clients.