

Morgan Stanley



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As a Financial Advisor with Morgan Stanley, Paul has over 30 years experience in financial services. He received his MBA from Rutgers University prior to earning certificates including: CERTIFIED FINANCIAL PLANNER[™], (CFP[®]), Charter Financial Consultant[®], (ChFC[®]), Chartered Advisor in Philanthropy[®], (CAP[®]), and Chartered Life Underwriter[®], (CLU[®]). Paul has a diverse background in financial and estate planning as he has worked at Lutheran Brotherhood, Fidelity Investments and Merrill Lynch Trust Company prior to coming to Morgan Stanley. At Merrill Lynch, he was a Senior Philanthropic Consultant assisting Financial Advisors design charitable strategies for their clients. Additionally, he spent 12 years as host, and co-producer, a cable show he created, *You and Your Money*, which was broadcast throughout New Jersey.

Paul is also a member of the Society of Financial Service Professionals, (SFSP), the Estate Planning Council of New York City, the Society of Trust and Estate Practitioners, (STEP), and the American Council on Gift Annuities, (ACGA). He has been an Associate Trustee of the Sigma Pi Educational Foundation, a board member of the New Jersey Association of Fundraising Professionals, (AFP), Chair of the NJ AFP State Conference, and board member of the Gift Planning Council of New Jersey, the statewide affiliate of National Association of Charitable Gift Planners (NACGP). Paul has his BS in Civil Engineering from Valparaiso University.

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