

CURRICULUM VITAE  
**VINCENT M. D'ADDONA, CLU, ChFC, AEP, CExP**  
Strategies for Wealth  
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Mr. Vincent M. D'Addona, CLU, ChFC, AEP is a senior associate at Strategies for Wealth Creation & Protection. He has 34 years of experience in providing financial planning, charitable planning, estate planning, retirement planning and investment services to a variety of clients and organizations. Often known as the experts' expert, he has helped hundreds of individuals move closer to their full financial potential. He is a nationally known practitioner of Personal Financial Economics. He is the co-creator of the Economic Confidence Building Process and has spoken on and trained the subject to various planning organizations and individuals.

### **Licenses and Certifications**

Various State Life and Health Licenses	1979
Registered Representative – Series 7	1983
Chartered Life Underwriter	1983
Chartered Financial Consultant	1983
Accredited Estate Planner	1998
Registered Financial Consultant	2002

### **Education**

Bachelor of Arts, Biochemistry  
Cornell University

Master of Science, Financial Services  
The American College

### **Professional**

Strategies for Wealth Creation & Protection

Senior Associate, N.Y.C. Office

Park Avenue Securities – Registered Representative

## VINCENT M. D'ADDONA, CLU, ChFC, AEP, CExP

### Professional Organizations and Committees

Financial Planning Association

Society of Financial Service Professionals

2005 - 2008 Director New York City Chapter  
2008 - 2009 Executive Vice President New York City Chapter  
2009 - Present President

P.A.C.E.

Association for Advanced Life Underwriting

Workshop Sub-Committee Chair 2010 Annual Meeting  
Breakout Session Speaker at the 48th AALU Annual Meeting International Forum

International Association of Registered Financial Consultants

Million Dollar Round Table

Life and Qualifying Member-27years  
Court of the Table-15 years  
Top of the Table-7 years  
Focus Session Speaker at the 2003 MDRT National Meeting

National Association of Insurance and Financial Advisors

New York City Association of Insurance and Financial Advisors

1993 - 1994 Director  
1995 - 1996 Education Chair  
1996 - 1997 Professional Development Chair

National Association of Estate Planning Councils

New York Estate Planning Council

1995 - 1998 Director

The Guardian Life Insurance Company of America

Senior Sales Consultant  
President of the Executive Committee of the Leaders Club 1992 – 1993  
Field Product Committee  
Field Technology Committee

LEAP Systems Inc.

1997-2005 Advanced Class National Trainer

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