



The Samalin Investment Counsel Team

Andrew Samalin, CFP® Principal

Andrew Samalin has been advising affluent individuals, businesses and foundations since 1992 and is the principal of Samalin Investment Counsel, an SEC Registered Investment Advisory firm with offices in Westchester, NY and NYC. Prior to founding Samalin Investment Counsel, he held Senior Vice President – Investment positions at Morgan Stanley, Prudential Securities, and Wachovia Securities.



He received both his bachelors and masters degrees from New York University, and is a doctoral candidate in Management Studies at Pace University. He is also a CERTIFIED FINANCIAL PLANNER™ professional.

Andrew has served as a graduate-level lecturer at New York University for Real Estate Analytical Techniques under Professor Lawrence Fiedler and Adjunct Professor of Investment Management at Mercy College, Dobbs Ferry, NY. He has also been featured in many investment publications including *Entrepreneur Magazine*, *Financial Planning Magazine*, *Investors Alley*, *Financial Advisor Magazine*, *Investment News*, *Research Magazine*, *Fidelity Investments: Fidelity Update* and *Westchester County Business Journal*.

In January 2013, Andrew was elected to the Board of Directors of the NY Association of Collaborative Professionals and in December of 2012, he was elected President of the Association of Divorce Financial Planners. SICounsel was awarded “Top Wealth Manager” in 2011 by *AdvisorOne.com* and in 2012 by *Investment Advisor Magazine*. *Financial Advisor Magazine* named Samalin Investment Counsel, LLC to its nationally-ranked listing of “Top 500 RIAs for 2010”, SICounsel’s first national award, as did *Wealth Manager Web Magazine*, also for 2010. *Westchester Magazine* voted Samalin Investment Counsel, LLC “Best in Customer Service” for both 2009, 2010, and 2011. In April 2007, he had the honor of hosting a reception on the floor of the New York Stock Exchange. Andrew was appointed Treasurer for Bethel Nursing Homes, named to its Executive Committee, and Chairs its Investment Committee. e Westchester County Business Council to the Rising Stars: Westchester Forty Under Forty, 2007. In 2005, Wachovia Securities named him a “Premier Advisor,” their highest tier of advisor.

WESTCHESTER

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John R. Fussell, Vice-President - Investments

John R. Fussell is a Vice President- Investments at Samalin Investment Counsel. He has been a Wealth Manager of high net worth clients and businesses for over 12 years. Prior to joining Samalin Investment Counsel, he held Vice President – Investments positions at Oppenheimer, UBS, and Wachovia Securities. While at UBS, he assisted in managing the option exercise program for a Fortune 100 company. John was awarded “Top Wealth Advisor” in *Westchester Magazine* for 2010 and 2011.

Since starting in the securities business in 2000, John has extensive expertise in advising small business owners and real estate developers. He has owned and operated a real estate development company that builds and develops luxury custom residential homes in Westchester, Putnam and Dutchess counties. John holds the FINRA Series 7 and 63 licenses. John resides in Briarcliff Manor, NY with his wife, and two children John Jr. and Jamie.

Our Services

Comprehensive Financial Planning

Investment Management

Divorce Financial Planning

Actuarial / Pension Consulting

Trust and Estate Planning

Retirement Planning

Financial Check-ups
Second Opinions

Account Aggregation and Oversight



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Clare Casey, Senior Service Representative

Clare has over nine years of securities brokerage experience assisting clients at Wachovia Securities and Morgan Stanley Dean Witter. Clare takes a keen interest in the well-being for those she is called upon to assist. In her time away from the office, she and her husband enjoy their wine cellar with friends and family.

Thomas Jay Kowalchuk, Registered Associate

TJay began his career in financial services as a Client Services Associate with Smith Barney in 2005, after graduating from SUNY Binghamton with a Bachelors degree in Human Development. His intrigue with the financial markets drew him to seek employment in the industry and his desire to work with people makes him a perfect fit for SICounsel. TJay holds both Series 7 and Series 66 registrations.

While at Binghamton, he received the Jake Pitler Award for Baseball and Academics, and was a New York State Chancellor's Scholar. He is also a musician and loves spending his free time singing and playing guitar, trumpet and piano.



Maria McKee, Financial Service Associate

Maria is a former branch chief in the Investment Management Division of the U.S. Securities and Exchange Commission (SEC). Having worked there for seven years, she gained extensive experience in evaluating advisors, examination procedures, Registered Investment Advisor operations and processes regarding investment suitability. Most recently, Maria worked as an Associate Advisor at a private wealth management firm in Purchase, NY. She earned an MBA in Finance from Pace University and a B.S. in Chemical Engineering from SUNY Buffalo. She has also completed the coursework for the Certified Financial Planner (CFP) certification and she is pursuing a Certified Divorce Financial Planning (CDFP) certificate as well. Maria enjoys giving back to the community by volunteering with the United Way, church boards, PTA Committees and The Girl Scouts. In her free time, she enjoys traveling and spending time with her husband and daughter.

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