



SAMALIN
INVESTMENT COUNSEL

ANDREW SAMALIN, PRINCIPAL .CFP®, EA, CDFATM



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 satellite offices in NYC, Philadelphia, and Long Island, NY. 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. He is also a CERTIFIED FINANCIAL PLANNER™ professional and an Enrolled Agent, licensed to practice in front of the Internal Revenue Service.

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 presented in front of the Westchester County Bar Association, Matrimonial Section, the ADFP and IDFA annual conferences, as well as the NYACP financial symposiums on topics relating to divorce and finance. Mr. Samalin has been quoted in most major local and national news outlets.

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. Financial Advisor Magazine has named Samalin Investment Counsel, LLC to its nationally-ranked listing of RIA's consecutively from 2010 through 2018. Westchester Magazine voted Samalin Investment Counsel, LLC "Best in Customer Service" from 2009 - 2018.

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. He was elected by the Westchester County Business Council to the Rising Stars: Westchester Forty Under Forty, 2007. *(Continued)*

Presentations and Media Events

News12 Westchester, Financial planner offers advice to those affected by the gov't shutdown – Jan 2019

Westchester County Bar Association, Matrimonial Section, Real estate finance – July 2018

Association of Divorce Financial Planners Catalyst Conference – *Creating Liquidity Solutions* – Oct 2018

SIcounsel Opens North Fork, Long Island Branch – August 2018

Financial Advisor Magazine RIA Ranking – July 2017

Westchester Magazine Five Star Wealth Manager – May 2017

Named Treasurer of the NY Association of Collaborative Professionals – Feb 2017

Samalin Integral to Westchester Meadows acquisition – Dec 2016

Westchester Magazine Five Star Wealth Manager – July 2016

Financial Advisor Magazine RIA Ranking – July 2016

IDFA National Conference presenter "*Real Estate and Divorce*" – May 2016

Investment News, *Don't let infidelity cloud your clients' decisions in divorce*– Oct 2015

Newsday, *Money Fix: Setting Priorities for your 40s*–Oct 2015

Chase.com, *Managing Credit After a Divorce*– Sept 2015

SafeBee.com, *8 Ways to Protect Your Finances During a Divorce*–Aug 2015

Westchester Magazine Five Star Wealth Manager – Aug 2015

WVOX Radio feature "*Dialogue on Divorce*" – July 2015

Association of Divorce Financial Planners NYC Chapter Meeting Speaker – June 2015

Investment News 2015 Retirement Summit featured speaker "*Gray Divorce*" – May 2015

Financial Advisor Magazine RIA Ranking – July 2014

NYACP Training Conference speaker "*Divorce Financial Issues*" – May 2014

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PHONE

914-666-6600

FAX

914-666-6602

EMAIL

Info@SamalinGroup.com

WESTCHESTER

297 King Street
Chappaqua, NY 10514

NEW YORK CITY

One Grand Central Place
Suite 4600
New York, NY 10165



Samalin Investment Counsel, LLC is a fee-only, nationally recognized SEC registered investment advisory firm. With offices in Chappaqua NY and NYC, we specialize in wealth management, pre and post divorce financial planning, retirement planning, and other related financial services.

Samalin Investment Counsel is registered as an investment adviser with the SEC. The firm only transacts business in states where it is properly registered, or is excluded or exempted from registration requirements. Registration does not constitute an endorsement of the firm by the Commission nor does it indicate that the adviser has attained a particular level of skill or ability.

All investment strategies have the potential for profit or loss. Changes in investment strategies, contributions or withdrawals, and economic conditions, may materially alter the performance of your portfolio. Past performance is not a guarantee of future success.

Different types of investments involve varying degrees of risk, and there can be no assurance that any specific investment will either be suitable or profitable for a client's portfolio. There is no guarantee that a portfolio will match or outperform any particular benchmark.

Third-party rankings and awards from rating services or publications are no guarantee of future investment success. Working with a highly-rated adviser does not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the adviser by any client nor are they representative of any one client's evaluation. Generally, ratings, rankings and recognition are based on information prepared and submitted by the adviser. Additional information regarding the criteria for rankings and awards is available upon request.



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(Continued)

Areas of Expertise

- ▶ Financial Analysis and Planning
- ▶ Divorce Financial Planning
- ▶ Portfolio Design
- ▶ Financial Planning
- ▶ Balance Sheet Management

Education / Certification

- ▶ BA, New York University
- ▶ MS, New York University
- ▶ FINRA Series 7 & 63 (*inactive due to fee-only status*)
- ▶ CERTIFIED FINANCIAL PLANNER™ practitioner
- ▶ Enrolled Agent, Internal Revenue Service

Teaching Assignments

- ▶ Real Estate Analytics – New York University
- ▶ Investment Management – Mercy College

Board Memberships

- ▶ Bethel Nursing & Rehabilitation Center, Treasurer, Executive Committee; Chair, Finance and Investment Committee, 2009 - present
- ▶ Association of Divorce Financial Planners, President 2012-2015, Board of Directors 2012- present
- ▶ New York Association of Collaborative Professionals, Treasurer 2016-2018 Board of Directors 2013- Present
- ▶ Board of Trustees, Temple Shaaray Tefila, Bedford Corners, NY

Presentations and Media Events

(Continued)

Westchester Magazine *Five Star Wealth Manager* – April 2014

Financial Advisor Magazine *RIA Ranking* – July 2013

Elected to Board of Directors of NY Association of Collaborative Professionals–Jan 2013

Elected president of the Association of Divorce Financial Planners – Dec 2012

New York Times featured in the article *Saving on Real Estate in a Down Economy*–June 2011

Dow Jones Newsletter featured in the article *Save What's Left of My Inheritance!* –Oct 2011

Entrepreneur Magazine quoted in the article *How to Improve Your Credit Score* –June 2010

Fidelity Investments guest speaker at the Road to Independence seminar – May 2009

Westchester County Business Journal–Rising Stars: Westchester's Forty Under Forty–2007

RNN-TV Market Watch at the NASDAQ MarketSite–Market commentary

News 12 Westchester–Market commentary

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