



**SAMALIN**

INVESTMENT COUNSEL

## OUR LEADERSHIP

### THE SAMALIN INVESTMENT COUNSEL TEAM



ANDREW SAMALIN, CFP®, EA, CDFP™

**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, with 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.

Andrew lives in Bedford, NY with his family and their dog Lucky.



LAURANCE J. KERSH, CFP®

**Director - Investments**

An industry veteran since 1997, Larry joins us from UBS, where he has been advising officers of non-public small and mid-size businesses and professionals. Larry is a Certified Financial Planner®, and incorporates the results of a financial plan into an investment roadmap to help the client achieve their financial goals, integrating both sides of the balance sheet.

Laurance graduated from SUNY Stony Brook, where he majored in Sociology and minored in Business. He lives in South Salem, NY with his wife and three children.

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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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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, Sarafina and his two children John, Jr. and Jamie.



John B. Hadley, Jr.  
**Vice President - Investments**

Having joined the securities business in 1986, John B. Hadley, Jr. brings over three decades of knowledge and experience to Samalin Investment Counsel. John graduated from Drexel University and holds a Bachelor of Science degree in Finance. He holds the series 65 securities license. John specializes in retirement planning for teachers in the 403b market and IRA Rollover processing and management. He resides in Philadelphia

with his children. In his free time, John enjoys watching movies, traveling, and keeping busy with his children's swim team and soccer events.



Matthew P. McKee, CFA  
**Financial Advisor**

Matthew is an investment professional with a unique combination of experiences in both asset management and healthcare finance. His 14 years of professional experience includes Gabelli Funds, Farallon Capital Management, Boston Medical Center, and PYA, a healthcare consulting firm focusing on practice valuation opinions and advice related to businesses and physician compensation arrangements. Matthew works with dentists

to grow and protect their wealth with tax planning, financial planning, and investment management services. His holistic approach incorporates expertise surrounding all aspects of professional lifespans, from prioritizing student debt and retirement savings, to practice acquisitions and business consulting, to retirement and estate planning. Matthew graduated with a BA in Economics from Hamilton College and an MBA from Vanderbilt University. He is a CFA Charterholder and is an Adjunct Professor in Economics at SUNY Suffolk. In addition, Matthew is a wine enthusiast studying for Level II of the Court of Master Sommelier program and is an avid golfer.

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CLARE CASEY

**Senior Service Representative**

Clare has more than 17 years of securities brokerage experience of 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

**Operations Manager**

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. While at Binghamton, he received the Jake Pitler Award for Baseball, 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 J. MCKEE, CFP® CDFA®

**Chief Compliance Officer, 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. Maria also holds both the Certified Financial Planner and Certified Divorce Financial Planner designations. 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.



MISHELLE CILIBERTI, CPA

Mishelle graduated from SUNY Oswego with a BS in Accounting, and began working in the public accounting sector earning her CPA. She moved on to the private sector was employed by Unilever for 6 years gaining experience in the accounting and internal auditing departments moving up to manager in their military division. She joined the firm four years ago, and is responsible for the firms accounting needs.

Mishelle resides in Somers with her husband and three children where she volunteers in her community, including Girls Scouting and fundraising events.

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