



Todd A. Herman, CFP[®], AIF[®]

FINANCIAL ADVISOR

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Todd brings over a decade of experience as an engineer and in the financial services industry. His passion is to take complex situations and build clearly defined financial plans from the ground up. He enjoys building strong relationships with a diverse group of clients to provide clarity, confidence, discipline and support for clients to achieve their long term goals.

Todd graduated from Union College with a BS in Mechanical Engineering and a minor in Mathematics. He began his career as an engineer, designing casinos and hotels across the United States before receiving his MBA with a concentration in Corporate Finance from the Carroll School of Management at Boston College. Todd transitioned his career to the financial services industry, quickly earning his CFP[®] (CERTIFIED FINANCIAL PLANNER[™]) and AIF[®] (Accredited Investment Fiduciary[®]). Todd continually provides expert guidance for high net worth individuals who require highly customized, comprehensive goal based financial plans.

Todd and his wife Priscilla, met while competing for the Union College Swimming and Diving Team and have one very energetic son. Together they spend time skiing, hiking, gardening, cooking and swimming.

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