

Geoff Forcella

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EXPERIENCE

FORCELLA WEALTH MANAGEMENT

LPL FINANCIAL

2007-present

LPL Financial Planner, LPL Registered Principal, Technology Director and Strategist

Work closely with clients and other advisors in every step of the financial planning process:

- Defining the client-advisor relationship.
- Gathering data.
- Analyzing and evaluating financial status.
- Developing and presenting recommendations and/or alternatives.
- Implementing recommendations.
- Monitoring recommendations and making changes as necessary.

Create, implement and monitor systems to ensure compliance requirements are met.

Develop and implement technology systems to efficiently share knowledge with multiple financial advisors and staff.

- Created the firms first wiki-based intranet and developed many of the internal practices.
- Created the firms first website.
- Developed and finalized business plan, advisor contracts and staff agreements.
- Wrote case studies and other proprietary marketing pieces.

STRAIGHT TALK FOR TEENS

2005-present

Contributor

Active contributor to the syndicated teen advice column, Straight Talk for Teens.

EDUCATION

THE AMERICAN COLLEGE

2009-2010

Chartered Life Underwriter Program. The educational component of the CLU® certification. Eight courses covering advanced insurance planning topics and applications.

UC LOS ANGELES

2008-2009

Certificate in Personal Financial Planning. The educational component of the CFP® certification, eight courses covering the 89 topics that are the basis for the CFP® Certification Examination.

UC BERKELEY

2004-2007

BA, Rhetoric. Berkeley, 2007. Concentrated on legal theory and philosophy.

PROFESIONAL DESIGNATIONS

- **Certified Financial Planner™ (CFP®)**
- **Chartered Life Underwriter® (CLU®)**
- **Accredited Investment Fiduciary® (AIF®)**
- **Certified Fund Specialist® (CFS®)**
- **Certified Wealth Preservation Planner™ (CWPP™)**
- **Personal Financial Planner (PFP)**