

# Biography



## **Clifford Schechter**

Senior Vice President  
Private Financial Advisor  
619.515.5720

### **Responsibility**

Coordination of the delivery of comprehensive financial planning advisory services including investment alternatives, estate planning services and tax strategies to high net worth individuals and families. Works closely with clients and their outside advisors to provide specialized wealth management and fiduciary services.

### **Education**

- BS, University of Rhode Island, Kingston, Rhode Island
- MBA, Long Island University, Greenvale, New York
- JD, Fordham University School of Law, New York, New York
- Certified Financial Planner
- RIA

### **Experience**

Eighteen years of finance, tax, trusts and estates, risk management and investment experience.

### **Memberships**

- Board of Trustees, San Diego Hall of Champions
- Past President, Professional Fraternity Association, Inc.
- Past President, Phi Alpha Delta Law Fraternity, International
- Lecturer, Entrepreneurial Management Center, San Diego State University
- Adjunct Professor, Adelphi and Pace Universities, F/P Faculties