



ONECAMBRIDGE, LLC.

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QUALIFICATIONS: Over 31 years of experience as a Financial Services Professional. Became a Certified Financial Planner in 2006. As a Vice President of OneCambridge LLC, Carlton's responsibilities entail recruitment, development and coaching for both inexperienced and seasoned financial professionals.

FINRA Series 6, 7, 63, 65, and 24, Life and Health Insurance, including Annuities, Long Term Care, and Disability.

EXPERIENCE: OneCambridge, LLC | Miami, FL
Vice President, 2009 – Present

AXA Advisors, LLC | Miami, FL
Financial Advisor, 1996 – 2009

Mount Sinai Medical Center Foundation | Miami, FL
Director of Finance & Administration, 1989 – 1996

Ernst & Young Public Accountants | Miami, FL
Staff Auditor, 1986 – 1989

EDUCATION: Bachelor of Science, Accounting, 1986
Florida State University | Tallahassee, FL

Certificate in Retirement Planning, 2007
Wharton School, University of Pennsylvania | Philadelphia, PA

PERSONAL: Carlton, his wife Suzanne, and their son Joshua make their home in Miami, Florida. In their free time, they enjoy traveling and experiencing new cultures. Carlton's personal interests include cooking, football, and new technology.

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