STRAUSS
WEALTH MANAGEMENT

Independence Powered By LPL Financial

Craig R. Strauss, MBA, AIF®, AAMS®, CRPS®, CLTC
LPL Financial Advisor

FOR IMMEDIATE RELEASE

Strauss Earns Accredited Investment Fiduciary Designation from the Center for Fiduciary Studies

June 2017

(Newburyport, MA)…..Craig R. Strauss, MBA, AIF®, AAMS®, CRPS®, CLTC, of Strauss Wealth Management has been awarded the Accredited Investment Fiduciary® (AIF®)) designation from the Center for Fiduciary Studies™ (the Center), the standards-setting body for fi360. The AIF designation signifies specialized knowledge of fiduciary responsibility and the ability to implement policies and procedures that meet a defined standard of care. The designation is a culmination of a rigorous training program, which includes a comprehensive, closed-book final examination under the supervision of a proctor, and agreement to abide by the Code of ethics and Conduct Standards. On an ongoing basis, completion of continuing education and adherence to the Code of ethics and Conduct Standards are required to maintain the AIF designation.

fi360, based near Pittsburgh, Pa., is the first full-time training and research facility for fiduciaries, and conducts training programs throughout the United States and abroad. Fi360 helps its clients gather, grow, and protect assets through better investments and decision-making. Since 1999, fi360 has been providing innovative solutions to financial services providers, including the AIF® and AIFA® training programs, the fi360 Toolkit™ software, and fi360 Fiduciary Score®. fi360's vision is to be the leading provider of services that raise the level of professionalism in investment management. With extensive education, certification, software, and practice management offerings, fi360 is a one-stop shop equipped to provide individuals and organizations with the training, tools, and resources necessary to become more successful.

Strauss graduated Wakefield High School in 1981 and obtained both a Bachelor's of Science degree in Business Administration and an M.B.A from Northeastern University. He is an LPL Registered Representative, an LPL Investment Advisor Representative, an ACCREDITED INVESTMENT FIDUCIARY® designee, a CHARTERED RETIREMENT PLANS SPECIALIST℠ designee, an ACCREDITED ASSET MANAGEMENT SPECIALIST℠ designee, holds the CLTC (Certified in Long-Term Care) designation, and maintains his Series 6, 7, 63 and 66 state securities registrations held through LPL Financial and insurance licenses in Massachusetts, New Hampshire and Maine.

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Strauss has over 30 years of financial industry experience starting as a Financial Analyst at Bolt Beranek & Newman from 1986 to 1993 in Cambridge, then as Director of Finance at Fidelity Investments Institutional Services (Advisor Division) from 1993 to 2001 in Boston. After serving as U.S. Controller for Forrester Research in Cambridge, Strauss started and managed the Edward Jones Investments office in Wakefield, MA from 2002 to 2010 before founding Strauss Wealth Management in 2010 as President and affiliating with LPL Financial, the nation's largest independent brokerage firm (according to *Financial Planning* magazine, June 1996-2017, based on total revenue).

Strauss is a member of the Financial Planning Association of Massachusetts and Newburyport Chamber of Commerce. He resides in Newburyport with his wife Mary Beth and daughters, Elizabeth and Katie.

Strauss Wealth Management is an independent wealth management services firm providing objective guidance and planning strategies to individuals, families and small businesses to help them pursue their long-term financial goals. For more information, visit www.strausswealth.com. Strauss Wealth Management is located at 37A Pleasant Street, Suite 8, Newburyport, MA 01950. Strauss can be reached by phone at (978) 465-4000 or by email at craigs@strausswealth.com.

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