



Comprehensive Wealth Management

3500 W. Olive Avenue, Suite 300, Burbank, CA 91505



Professional Credentials: Robert Farmer

Robert Farmer is President and CEO of Comprehensive Wealth Management in Burbank, CA which he founded in 2005. He has been providing investment services to clients since 1987. Before Comprehensive Wealth Management, he served as a Vice President and Trust Officer in Los Angeles for 9 years. Bob's experiences in trust services, investment management, estate planning, charitable planning, retirement planning, real estate and insurance enable him to provide clients and professionals with a broad range of financial strategies. His background makes him a qualified professional to provide comprehensive financial consulting that integrates each aspect of a client's financial,

business, and personal life.

Education and Certifications

Bachelor of Science, Business Administration, the University of Southern California

Specialties include: Hedge Funds, Private Equity Funds, Multi-Advisor Funds, Structured Products, Business Development Funds, and Exchange Funds

Professional Licensing

FINRA Series 6, 7, 24, 63, & 66 Securities Registrations held through LPL Financial, LLC

California Department of Insurance Life Agent/Variable Contracts License #0B15191

California Bureau of Real Estate Broker's License ID # 00962626

Colorado Division of Insurance License # 43284

Ohio Department of Insurance License # 703644

Securities Registrations and Investment Advisor Representative of LPL Financial, LLC in: California, Colorado, Georgia, Nevada, New York, Ohio & Texas.

Specialized Fiduciary and Investment Training

Cannon Financial Institute, Boston University, Boston, MA

MassMutual, Estate and Business Succession Planning, Los Angeles, CA

College for Financial Planning, Estate Planning for Qualified Plans and IRAs



Recognition and Awards

2013-2017 Los Angeles Magazine Five-Star Wealth Manager*

International Who's Who of Professionals

Who's Who in Financial Planning

*Award based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Wealth

managers do not pay a fee to be considered or placed on the final list of 2013 - 2017 Five Star Wealth Managers.

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Community Involvement *(past and current)*

President, San Fernando Valley Estate Planning Council
Trustee, Pasadena Historical Museum
Chairman, Los Angeles Trust and Tax Forum
Board Member, Leave-A-Legacy, Planned Giving Round Table of Southern California
Member, Los Angeles Estate Planning Council
Member, Western Pension and Benefits Conference
Member, San Fernando Valley Estate Planning Council
Member, Insured Retirement Institute

Other Information and Recognition *(past and current)*

Trust, Investment, and Estate Planning Speaker
All-American Team, American Funds Group
Continuing Education Sponsor:
 Certified Financial Planner® Board of Standards, Inc.
 Certified Public Accountants
 California Department of Insurance Sponsor #112884
Planned Giving Advisory Council, Hollygrove Home for Children
Instructor, Glendale College, Adult Education
Real Estate Educator, California Community Colleges, Real Estate Education Center

Contact Information

Comprehensive Wealth Management, LLC
3500 W. Olive Avenue, Suite 300
Burbank, CA 91505

Local Phone: 818-237-5589
Toll-free Phone 888-TRUST 01 (888-878-7801)
Toll-free Fax: 877-CWM PROS (877-296-7767)

Email: Bob.Farmer@LPL.com
Website: ComprehensiveWealthManagement.com

Compliance Disclosure

Robert F. Farmer is a Registered Principal with and securities, advisory services, and financial planning services offered through LPL Financial, LLC, a Registered Investment Advisor. Member FINRA/SIPC. CA Insurance License # 0B15191.