

# RZ WEALTH

*“RZ Wealth assists our clients to fulfill their financial objectives. We convey those wishes for financial security to their families through action and results. Our comprehensive planning and creative strategies have allowed us to have deep, continuing and multi-generational relationships with the families with whom we work.”*

RZ Wealth Founder and President, Irv Rosenzweig, leads a nationally recognized and award-winning wealth management firm. His talented team of financial experts offers decades of experience and a commitment to the fiduciary process and adherence to always putting the clients' interests first. RZ Wealth's highly accredited financial advisors include Irvin W. Rosenzweig, CFP®, ChFC®, CLU®, CRPS®, AEP®, AIF®, Samuel P. Varano, CFP®, AIF® and Peter Hackenbrack, AIF® who serve their clients along with a dedicated support staff.

RZ Wealth as a Registered Investment Advisor (RIA), governed by the SEC, follows the highest ethical standards of the financial industry as required under the Code of Ethics as Accredited Investment Fiduciaries (AIF®) and Certified Financial Planners (CFP®). The firm's technology and analytics make implementing customized planning and solutions a seamless and embedded process for all clients.

In the 12 months ending August 20, 2018, RZ Wealth achieved a record year of growth by increasing firm assets under advisement in excess of 50 percent for a diverse and multi-generational client base. RZ Wealth is committed to helping clients prioritize and understand their needs to best guide them with insightful wealth management, including: financial education; retirement; and estate planning. RZ Wealth offers access to nationally recognized professionals skilled in portfolio management, financial planning, legal and accounting expertise to deliver a unique and high-quality experience.

Rosenzweig personally serves on various committees and advisory panels, including the Options Industry Advisory Council, Fidelity Investments Retirement Plans Advisory Panel and Barron's Financial Professional Opinions Council. Recognized by leading organizations and publications as one of America's premier advisors, Rosenzweig is a frequent guest on NASDAQ TV's Trade Talks program, which airs from their Marketsite Headquarters in NYC, offering expertise and insight on wealth management, financial planning, investment strategies and factors related to these fields such as tax reform, economic conditions and more.

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