



Roger Moulton Jr., CFP®[®], MSPFP | Senior Financial Planning Consultant

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Roger's professional experience extends from over a decade at a major wire house where he assumed progressive roles which included northeast fixed income coordinator and financial consultant. As a financial planner, Roger has worked with families, their charitable entities, their business entities, multiple younger and older generations, and the clients' circle of advisors including; CPAs, Attorneys, business partners, office managers and assistants

His extensive experience includes the following areas: Investments | Tax planning | Wealth Transfer | Philanthropy | Cash flow planning | Retirement planning | Advanced Estate Planning | Education funding options | Insurance needs analysis | Real Estate buy/sell decision

Roger earned the degree of Master of Personal Financial Planning from Bentley University and is a CERTIFIED FINANCIAL PLANNER™

As a financial consultant, Roger holds series 5, 7, 63, 66 and 24 licenses