



Financial Advisors of Delaware Valley

Brett T. Straub, CFP®, CLU®, ChFC®
Financial Advisor

400 Lippincott Drive, Suite 110
Marlton, NJ 08053

Phone: **856.596.6116** Ext. 215 ♦ Fax: **856.983.0457**

Toll Free: **888.237.7211** Ext. 215

Email: straub.brett@faodv.com

Website: www.faodv.com



Brett has been assisting clients for more than twenty years in the following areas:

- Strategies for Reducing Income and Death Taxes
- Funding Educational Goals
- Providing Income for Life
- Accumulating Wealth
- Income protection in the event of Death or Disability
- Retaining and Rewarding Key Employees

"You owe it to your family to meet with me!"

Brett Straub

Brett Straub has a passion for helping successful people reach their financial goals while protecting their families and businesses. Brett provides full service, fee-based financial planning services and will help build a team around you that understands your needs and concerns. As a former quarterback, Brett is qualified to help develop strategies for and execute your financial game plan.

Ongoing professional education is of the utmost importance to Brett. He earned his CERTIFIED FINANCIAL PLANNER™ professional designation from the College of Financial Planning in Denver, Colorado. Continuing this commitment to his clients, Brett has earned the Chartered Life Underwriter (CLU®) and the Chartered Financial Consultant (ChFC®) designations from the American College in Bryn Mawr, Pennsylvania.

Brett's numerous industry affiliations include the National Association of Insurance and Financial Advisors (NAIFA), the Financial Planning Association and the Million Dollar Round Table (MDRT). In 2004 he was awarded and has since held a coveted seat at the Court of the Table, one of the highest recognitions of achievement within MDRT.

Brett is grateful to be often surrounded by family and friends. He resides in Cinnaminson, New Jersey with his wife Joanne and son Brady. When not meeting with clients Brett enjoys playing ice hockey, skiing, flying and reading historical fiction.

Offices in: Delaware ♦ Pennsylvania ♦ New Jersey ♦ Maryland

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