



E2E Financial, LLC
Ever to Excel

Andrés M. Romero, ChFC, CFP®
Personal CFO



Andrés M. Romero, ChFC, CFP®

Speaker's Packet

678-664-9745

andres.romero@e2efinancial.com

www.e2efinancial.com



E2E Financial, LLC

Ever to Excel

Andrés M. Romero, ChFC, CFP®
Personal CFO

Andrés M. Romero, ChFC, CFP® Personal CFO

- ◆ Member of The Academy of Dental Management Consultants (ADMC) since 2005
- ◆ ADMC National Meeting, Presenter
- ◆ Schwartz Consulting's Dental CEO Success Seminar, Speaker
- ◆ Speaker at various dental schools & dental study clubs
- ◆ Atlanta Magazine's 5 Star Wealth Manager*
- ◆ Graduate of Boston College Bachelor of Science, Major - Finance
- ◆ Member of the Financial Planning Association & Board of Directors Emeritus (Georgia Chapter)
- ◆ Founded independent financial planning practice,



Andrés has been advising clients and their families since 1993. E2E serves dentists, doctors and women in life transition as their Personal CFO. E2E focuses on financial planning, investment planning, estate planning, benefits planning and succession planning needs.

Andrés has been interviewed on financial topics by *The Atlanta Journal Constitution*, Bloomberg Radio, and Channel 2 WSB-TV. Andrés has also published financial planning articles in *Dentist's Money Digest*. Andrés has been featured on *A Step Above*, the audio newsletter of the Academy of Dental Management Consultants (ADMC).

Presentation Topics:

- Maximizing Your 401k Now!
- What Do Profit & Loss Statements Have To Do With It?
- Key Tax-Saving Strategies You Can Implement Now!

2021 Presentation Dates:

- The Revenue Pie:
How to Keep a Bigger Slice
Nashville, TN
September, 2021

Previous Presentations:

- The Revenue Pie:
How to Keep a Bigger Slice
October, 2019
- Schwartz Consulting Group
Dental CEO Success Team
Seminar
November 2017, 2018
- ADMC National Meeting
2007, 2018
- ADMC Educational Series
Webinar
July 25, 2018