



**Neil R. Waxman**  
**Managing Director**

Neil has been recognized nationally as a leader in the financial services industry. He has 23 years of experience as an advisor, coordinator, and catalyst for some of the region's largest private corporations and their owners.

Neil is a multi-year honoree, and currently a member of Robb Report's Worth Magazine's annual list of The Top 100 Wealth Advisors in America.

Neil's practice focuses on, but is not limited to, wealth management and the various tools and techniques utilized in that process, including business succession and corporate transaction strategies.

Neil is a regular speaker in the aforementioned areas, and has recently conducted advanced sessions on wealth management/business succession planning for the Greater Cleveland Partnership and The Society for Financial Service Professionals. In addition, his professional and civic activities include the following:

- Member, Board of Directors: Interlake Industries, Inc.
- Member, Board of Directors: 4 Walls.com, LLC.
- Member, Board of Directors, Officer: Cleveland Society for Financial Service Professionals
- Member, Board of Trustees, Officer, Congregation Bethaynu
- Member, Board of Trustees, Executive Board: Cascade Capital Corporation
- Member, Board of Trustees, Committee Chair: The Agnon School
- Partner, Cleveland Social Venture Partners
- Member, Board of Trustees: Jewish Education Center of Cleveland
- Member: Orange School District Citizens Finance Committee
- Chair: Cleveland/St. Petersburg, Russia Partnership Subcommittee of Overseas Connection Committee of The Cleveland Jewish Community Federation
- Member: University School Planned Giving Advisory Committee
- Chair, Financial Services Division: Jewish Community Federation of Cleveland, 2005, 2006, and 2007 Campaigns for Jewish Needs
- Assistant Wrestling Coach and Baseball Coach, University School, Middle School
  
- Past Member, Board of Directors, Board of Advisors: NextMed Systems, Inc.
- Past Member, Board of Directors: White Rubber Corporation.
- Past Member, Board of Directors: The Caiazza Candy Company
- Past Member, Board of Advisors: Undercar Express, LLC

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*and*  
**Vision**

Neil is a CFP® Practitioner. His professional affiliations include The Financial Planning Association (FPA), The Society of Financial Service Professionals (FSP), The Tax Club of Cleveland, and The Estate Planning Council of Cleveland, Ohio