



President

Chanie Schwartz, CFP®

Chanie Schwartz is a wealth manager with Securities America Advisors and founder of A Vested Interest Wealth Management located in New York City. She works closely with a select group of successful executives to help them achieve financial independence so that they can spend more time doing the things they love with the people they love.

Chanie takes her clients through a discovery process so that she can learn about their family, values, assets, advisors, processes, interests and goals. She then assembles and consults with a team of knowledgeable professionals from key areas of expertise in order to propose a sound financial program uniquely tailored to each client.

Practice Focus

- Wealth Management and Preservation
- Equity Compensation Strategies
- Asset Allocation
- Retirement and Pre-retirement Planning
- Tax-Advantaged College Funding Strategies
- Professional advice on stock option grants and executive compensation

Certification / Education

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®)
- Bachelors of Science degrees, Business, Management and Finance, Brooklyn College

Affiliations

- Securities America, Inc.

Wealth management is a strategy that encompasses advanced planning, investment consulting and relationship management. Advance planning includes asset protection, wealth enhancement, wealth transfer and charitable giving. By providing the knowledge and confidence busy executives need, but don't have time for, she helps take the guess work out of making prudent financial decisions.

After graduating cum laude from Brooklyn College with Bachelors of Science degrees in Business, Management and Finance, Chanie spent over eight years at Morgan Stanley. She successfully completed the demanding requirements to become a CERTIFIED FINANCIAL PLANNER™ professional through the Certified Financial Planner Board of Standards, Inc. Earning and maintaining the right to use the CFP® mark means that Chanie has passed a rigorous certification examination and continues to meet the CFP Board of Standard's specific education, experience and ethical requirements.

Chanie resides in Brooklyn, NY, with her husband Steven and their son. Whenever time allows, she pursues her love of spinning.

Securities offered through Securities America, Inc., Member FINRA/SIPC, Chanie Schwartz, CFP®, Registered Representative. Advisory services offered through Securities America Advisors, Inc., Chanie Schwartz, Investment Advisor Representative. A Vested Interest Wealth Management and Securities America are not affiliated.



295 Madison Avenue, Suite 1101
New York, New York 10017
Tel: 212-661-5190 • 877-661-5190
Email: avestedinterest@verizon.net
Web Site: www.avestedinterest.net