



Tax & Financial Advisors, Inc.

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Matt Carpinelli
President

Practice Focus

- Retirement Income Planning
- Wealth Preservation Strategies
- Tax Advantaged Portfolios
- Objective Investment Advice

Education

- BS in Finance – University of Colorado
- Preparing for the CFP® Certification Examination – College of Financial Planning, Denver CO

Affiliations

- Member, Financial Planning Association
- Volunteer, National Bone Marrow Transplant Link
- Volunteer, Leukemia & Lymphoma Society
- Member, St. Michael's Society
- Member, Lakewood Country Club

Media Resource

- Feature Story – FOX-31 News, Colorado

Matthew Q. Carpinelli

Matt Carpinelli is an independent financial planner and investment advisor representative who specializes in full service wealth management. As president of AFC Tax & Financial Advisors, Inc., Matt and his associates work together to consolidate all aspects of business and personal finance, including investment, tax and accounting needs.

Having lost his father at a young age, Matt learned early in life about the importance of fiscal responsibility and preparing for the unexpected. After gaining valuable experience while working for a 401K company right out of college, Matt quickly discerned that his real passion was in helping educate individuals about personal finance.

Matt provides uncompromising attention to detail as he reviews his client's current financial situation, risk tolerance and personal priorities. He believes the planning process is not just about the bottom line, but also understanding the client's dreams and values. Only then does he suggest appropriate financial strategies to help them set and realize their lifetime goals.

Matt is currently preparing for the CFP® Certification Examination through the College of Financial Planning in Denver to become a CERTIFIED FINANCIAL PLANNER™ practitioner. He has already met the CFP Board of Standard's specific experience and educational requirements. He graduated from the University of Colorado with a Bachelors of Science degree in Finance.

Matt balances his work with family time spent with his wife and two daughters. He is actively involved with the National Bone Marrow Transplant Link, the Leukemia and Lymphoma Society, St. Michael's Society and St. Mary Catholic Church in Littleton, CO. Beyond the investment management field, Matt is an amateur golfer and member of the second oldest golf club in Colorado. He also enjoys fishing, skiing, trips to Las Vegas and long walks on the beach.

Securities offered through Securities America, Inc., member FINRA/SIPC, Matthew Q. Carpinelli, Registered Representative. Advisory services offered through AFC Tax & Financial Advisors, Inc., Matthew Q. Carpinelli, Investment Advisor Representative. AFC Tax & Financial Advisors, Inc. and Securities America are not affiliated.

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