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- UBS's Global Circle of Excellence, 2008
- Chartered Financial Analyst (CFA)
- SUNY Stony Brook, 1987 BA in Economics
- CUNY Baruch College, 1995 MBA in Finance
- Adjunct Professor (Graduate Finance) CW Post College, 1998
- Author of ***Getting Started in Security Analysis*** 1st & 2nd editions (Wiley, 1998, 2009)
- Memberships: The CFA Institute, NY Society of Security Analysts, Bronx High School of Science Alumni, Westinghouse (Intel) Science Talent Search Award Alumni, St. Patrick's School Golf Committee; Long Island Power Network; St. Anthony's Fathers Guild
- Board Membership: President, The Claire Friedlander Family Foundation, Juvenile Diabetes Research Foundation, Rosen Family Wellness Center at Long Island Jewish Hospital, The Holocaust & Tolerance Center of Nassau County; The Long Island Community Foundation
- Fully licensed and registered securities professional since 1986