

Armand Atkinson

MS, CFP®, ChFC®, CIMA®, AIF®
CERTIFIED FINANCIAL PLANNER™ professional
Accredited Investment Fiduciary™ Wealth Manager

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Education/ Certifications

- BA in Economics & MS in Personal Financial Planning
- CFP® – CERTIFIED FINANCIAL PLANNER™ Professional
- ChFC® – Chartered Financial Consultant from the American College
- CIMA® – Certified Investment Management Analyst™ from the Investment & Wealth Institute
- AIF® – Accredited Investment Fiduciary
- CLU® – Chartered Life Underwriter from the American College
- MPAS®, AWMA®, CRPC®, CMFC® – designations from the College for Financial Planning
- CDFA® – Certified Divorce Financial Analyst
- ChFEBCSM – Chartered Federal Employee Benefits Consultant
- Graduate of Dave Ramsey's Financial Peace University
- FINRA Licenses: Series 7 and 66
- FL Life, Health & Variable Annuity Licenses

Armand A. Atkinson applies investment and wealth planning strategies to provide comprehensive solutions for business owners, families, and individuals. He believes in a systematic approach to money management and the importance of having a detailed process that is based on a foundation of intellectual rigor and discipline.

Having more than 16 years of professional investment management experience, he holds a Master's of Science Degree in Personal Financial Planning. He also holds the CIMA® designation through the Wharton School at the University of Pennsylvania and the CFP® designation among other industry recognized designations.

Mr. Atkinson serves as an authorized 403(b)/457 advisor for several public-school districts and colleges in Florida. Armand is licensed to conduct business in AL, AZ, CA, CO, DE, FL, GA, ID, IL, KS, KY, LA, ME, MD, MA, MI, MO, MT, NE, NV, NJ, NM, NY, NC, ND, OH, OK, OR, PA, SC, TN, TX, UT, VA, & WA.

He currently resides in St. Petersburg, Florida serving the Tampa Bay, Florida area where he enjoys networking and community involvement.

When Armand is not researching investments, he enjoys cycling, traveling, and spending time with his family and wife, Maria B. Atkinson and his three children Amelia, Abby and Armand J.W. He is also an avid electronics and computer enthusiast.

Areas of Focus

- Wealth Management
- Asset Allocation
- Estate and Wealth Transfer Planning Strategies

Personal Interests

- Stock & Investment Research
- Spending time with family
- Cycling
- Swimming