

Robert G. Alvarez, CFP®

**CERTIFIED FINANCIAL PLANNER™ professional
Wealth Manager**

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Education/ Certifications

- BS in Finance from USF
- CFP® – Certified Financial Planner Board of Standards, Inc.
- FINRA Licenses: Series 7, Series 65, & Series 24
- Florida Life, Health & Variable Annuities Licenses

Areas of Focus

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

Personal Interests

- Spending time with family
- Saltwater Fishing
- Boating
- Outdoor recreation

Robert G. Alvarez is a third-generation Floridian and during his 29 years of working in the financial services industry has had the privilege of serving many families in the Tampa Bay Community. He is a graduate of the University of South Florida with a degree in Finance and has also earned the CERTIFIED FINANCIAL PLANNER (CFP®) designation from the Certified Financial Planner Board of Standards, Inc.

To date, Mr. Alvarez has completed and currently holds the FINRA Series 7, Series 65 and Series 24 licenses along with the Florida Life, Health & Variable Annuities License.

Mr. Alvarez lives in the Carrollwood area of Tampa with his wife Lori, his daughter Olivia and their Golden Retriever, Toby. He enjoys spending time with his family and their hobbies include boating and spending time on Florida's beautiful beaches. His interests outside of work include keeping up with all of Olivia's activities from soccer to various clubs and social events. He is also a passionate saltwater angler.