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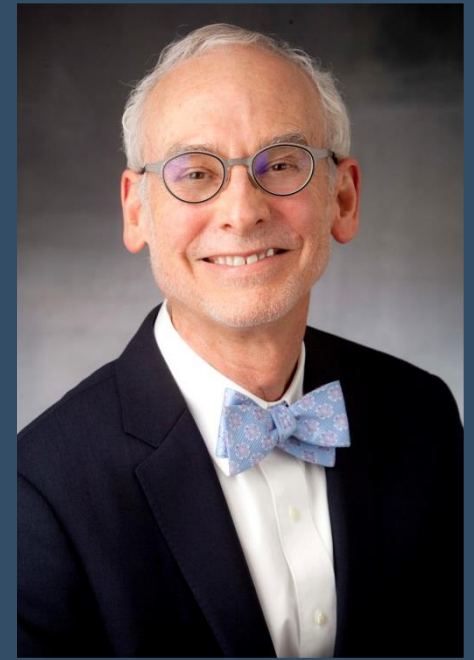
Michael F. Whitney is a financial advisor focusing on individuals and families including educators, medical practitioners, engineers, artists and musicians. Michael brings sound financial solutions to the clients he serves. Michael is a Chartered Retirement Planning Counselor<sup>SM</sup>.

Michael earned an M.B.A degree from the University of Southern California in 1989. He studied accounting at U.C.L.A. and passed the Uniform CPA Examination in 1993. Michael holds Series 7 and Series 66 securities licenses and life, accident & health, and variable contracts insurance licenses. He is an Investment Advisor Representative.

Working with clients, Michael incorporates a financial planning approach seeking to understand clients' current financial needs and future financial desires to construct a plan to accomplish their goals. Among the areas he addresses are risk assessment, investment management, estate conversation, life, disability, and long-term care insurance planning.

Michael brings a diverse background and broad fields of interest that help him to understand the experiences of his clients. As a filmmaker in the early period of computer graphics, he was awarded the American Film Institute's Independent Filmmakers Grant in 1976. He is the producer of the feature length documentary on Carl Gustav Jung, *Matter of Heart*. As a classical guitarist, Michael taught extensively and performed with Pierre Boulez at the Los Angeles County Museum of Art Monday Evening Concerts and Ojai Musical Festival. He is a past member of the Congregation Micah Board of Trustees, a founding member of the Nashville community interfaith Circle of Friends and a member of the program committee of Family of Abraham. He currently volunteers at the Nashville Symphony.

Michael and his wife Donna, a retired neurologist and now college professor at Watkins College of Art, Design and Film, are happily married residing in Forest Hills. Michael and Donna have two daughters, Sarah and Hannah. Michael enjoys spending time with his family, reading and hiking at Radnor Lake.



Michael F. Whitney, MBA, CRPC<sup>®</sup>

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