

BIOGRAPHY



Barry Levine, CFP®, CLU, ChFC, CDFA, PFP, MS(MBA)
Senior Vice President
Senior Wealth Advisor

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EXPERTISE

Barry has over thirty years of experience providing financial counseling to high net worth business owners, corporate executives, professionals, and retirees. Barry provides comprehensive planning and advisory services for clients regarding cash flow analysis, insurance, income tax, stock options, single stock concentrations, compensation and benefits, wealth transfer and charitable planning, and family education. Barry has served as a guest lecturer in estate planning for California State University, and he co-authored a chapter on managing inherited money in a book on personal financial planning.

EXPERIENCE

Barry's extensive background includes having been trained in investments with Dean Witter Reynolds (Morgan Stanley), in tax planning with KPMG LLP, in insurance with CIGNA, and in banking with The Citigroup Private Bank. Prior to entering the financial planning field, Barry worked in economic research and corporate financial analysis.

EDUCATION

Barry earned a bachelors degree in Economics from Brandeis University and a Master's degree (MBA) in finance and planning from the Sloan School of Management at MIT.

CREDENTIALS

Barry is a Senior Vice President and Wealth Advisor in Northern Trust's San Diego office. He is a Certified Financial Planner (CFP®), a Chartered Financial Consultant (ChFC) and Chartered Life Underwriter (CLU). He has a Certified Divorce Financial Analyst (CDFA) professional designation.

COMMUNITY INVOLVEMENT

Barry currently serves as Treasurer of the MIT Club of San Diego, and is a member of the North County Estate Planning Council. He previously served as Treasurer and Vice President of Early Childhood Education of his temple.

3 THINGS PEOPLE ASK ME

- **How much do I need to be financially independent and assured that I have sufficient assets to cover my future cash flow needs?**
- **How do I raise my children to be financially astute adults?**
- **How do I incorporate charitable giving into my overall financial and estate planning?**