



# MARC SLOTER, CFP®



Marc began his financial career in 1992 as a bank trust officer managing relationships and investments in personal trusts, retirement plans and court-appointed trusts. In an effort to deepen his client relationships and assist in advising clients on their entire financial picture he became a financial advisor in 2005.

## PRACTICE AREAS

Portfolio Management  
Financial Planning  
Retirement Planning  
Employer Retirement Plans  
Trust Management and Review

## EDUCATION

University of North Texas, B.B.A., Finance  
University of North Texas, M.B.A., Finance

## CERTIFICATIONS

CERTIFIED FINANCIAL PLANNER™ practitioner

## HONORS

FW Business Press “Forty under Forty” Recipient  
Leadership Fort Worth Participant

## CHARITABLE INVOLVEMENT

Trinity Valley School, Board of Trustees  
Trinity Valley School, Finance Committee  
Beth-El Congregation, Endowment Committee  
Tarrant County Hebrew Free Loan Association Board  
DD/FWHDS Supporting Foundation, Trustee Chair  
URJ Greene Family Camp, Camp Committee

## PAST CHARITABLE INVOLVEMENT

Women’s Haven of Tarrant County, Inc., Board President  
Safehaven of Tarrant County, Inc., Board Member  
Beth-El Congregation, Board President, Committee Member and Youth Advisor  
Jewish Federation of Fort Worth and Tarrant County, Endowment Committee Member