



# PHILIP E. WETZEL, JR.

FOUNDING PARTNER



Philip E. Wetzel, Jr. has over seventeen years' experience managing assets and counseling clients on personal and business financial management. A former CEO and President of a closely held corporation, Phil has direct experience in establishing, growing, operation and selling businesses. During his extensive business career, Phil was directly responsible for the management and oversight of over \$100 million in retirement community assets throughout the US. It is from this experience that he now utilizes when assisting business owners and executives to develop personal and business financial strategies.

## PRACTICE AREAS

- Portfolio management
- Financial planning
- Balance sheet and cash flow analysis
- Real estate transaction analysis
- Private placement offering review
- Buy/sell agreements structure
- Long-term care insurance

## EDUCATION

- B.S Degree in Hotel and Restaurant Management from Cornell University in 1978

## CERTIFICATIONS

- Texas Real Estate Broker's License

## PROFESSIONAL/PERSONAL AFFILIATIONS

- Institute of Real Estate Management (IREM)
- Lake Worth Steering Committee