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Robert E. Grace

Member since 06/19/2009
Member through 07/08/2020
Website <http://www.gracetax.com>
Industry Financial Services

Description

Robert E. Grace JD CLU ChFC has been helping retirees protect and preserve their life savings for more than 40 years. Specializing in Safe Money Strategies for retirement planning Grace works to ensure his clients will have an income stream for life avoid risk in a volatile market reduce taxes and plan effectively for the golden years. Hes a firm believer in people taking an active role in their retirement planning and can often be heard saying Its not what you make its what you keep Grace is the founder and president of GRACE TAX ADVISORY GROUP LLC an independent financial advisory firm committed to helping its clients achieve a worry-free retirement. The company was recently voted The Best of 2008 Income and Retirement Planners by the Fort Myers News-Press readers poll. Robert E. Grace was designated by Gulfshore Life Magazine as a 2009 Wealth Manager FIVE STAR Best in Client Satisfaction SM He can be heard each Sunday broadcasting his Retirement By Design show on several newstalk radio stations throughout Southwest Florida.

Education

Robert E. Grace is a Juris Doctorate JD having earned the degree from the Northern Kentucky Universitys Chase College of Law. He is a Chartered Life Underwriter CLU a Chartered Financial Consultant ChFC and a Chartered Financial Educator CFE. Prior to his financial career Grace attended the University of Cincinnati where he majored in Marketing and Insurance and earned his Bachelor of Business Administration degree. He was trained by and is a member of nationally acclaimed Ed Slott CPAs Elite IRA Advisor Group . Ed Slott was named by the Wall Street Journal as the Best Source for Individual Retirement Account advice.

Associations

Grace is a member of the Greater Fort Myers Chamber of Commerce and holds an A rating from Better Business Bureau of which he is also a member. He is a 40-year member of The National Association of Insurance and Financial Advisors and a 39-year member of The Society of Financial Service Professionals. He is a member of the Southwest Florida Estate Planning Council. He is also a member of The National Ethics Association. Dedicated to safety on the water Grace is a member of the Cape Coral Power Squadron.

References

Video and written testimonials by clients may be viewed on the company website WWW.GRACETAX.COM Professional references are available upon request.

