

Robert J. Pulles, CFP®, AIF®

Senior Financial Services Representative
Principal Securities Registered Representative
Financial Advisor



Seeking control over your financial future?

I can help — by reviewing your financial picture and suggesting customized solutions to help you address gaps and prepare for your financial future.

Let's connect to get started:

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[LinkedIn](#)

EXPERIENCE:

Over the past 20 years, Robert has built a successful financial services and advisory practice in the South Florida area specializing, in working with individuals at or near retirement. He has expertise in distribution planning from 401(k), 403 (b), 457 deferred compensation plans, DROP, cash balance and traditional pension plans, as well as stock option plans. When working with high net-worth executives, Robert provides tax and investment strategies to help minimize cost and maximize risk adjusted performance.

He uses a comprehensive approach in determining his clients' needs in retirement. Investment strategies are provided in a manner consistent with his clients' risk tolerance and distribution needs. His clients' future and current expenses are carefully reviewed prior to any recommendations.

EDUCATION & CREDENTIALS

BBA and a Major in Finance, – Florida International University

Certificate of Financial Planning from Florida State University.

CERTIFIED FINANCIAL PLANNER™ (CFP®) professional

Robert holds several securities registrations and insurance licenses. He is licensed in Florida and several other states.

INTERESTS:

Robert lives in Miami Lakes with his wife and three boys. He is very active in the Miami Lakes Community and various social and charitable organizations. He enjoys spending quality time with his family and the activities in which his sons participate.

AIF® (Accredited Investment Fiduciary®) is an educational designation only, obtained by the holder by completing the requisite coursework. The AIF Designation does not mean the holder is acting in a fiduciary capacity.

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