



## FPA of Metro New York 20th Annual Forum



### Jeff Rattiner, CPA, CFP®

President  
Rattiner's Financial Planning Fast Track, Inc.

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Mr. Jeff Rattiner is a nationally known speaker in the financial services industry with offices in Scottsdale, AZ and Denver, CO. Acting in the capacity of CPA and CFP® Certificant, he has been teaching classes nationally for financial advisors to earn their CFP® Certification since 1989. A leading educator and practitioner for professionals, he has pioneered the *Financial Planning Fast Track* educational program in 1997 which has won critical acclaim as the cover story in the December 2001 issue of *Financial Planning Magazine* and the October 2009 issue of *The Register*. His lively and entertaining teaching style has served professionals well for over 29 years.

In promoting current planning strategies to help advisors with their clients, Mr. Rattiner has made numerous presentations to financial advisors at the largest national financial service companies, including CPA firms, CFP® firms, banks, brokerage, insurance, technology, and consumer organizations. For CPA and CFP® professionals, Mr. Rattiner has taught CE classes for the California CPA Education Foundation, Western CPE, AICPA, CPE4U, state CPA Societies in Florida, California, Colorado, Arizona, Washington, Oklahoma, and Nevada, as well as FPA National and Chapters including Maryland, Massachusetts, LA, Rhode Island, Houston, Dallas, Colorado, Puget Sound, Middle TN, KC, NJ, MN, Capital Cities, FL. He was awarded the "1997 Distinguished Faculty Member-Teacher of the Year" by Community College of Denver and was named "Financial Planner" of the Year by *CPA Magazine* in 2003.

He has authored eight books on financial planning subject matter, and is a leading authority and sought-after speaker in the industry. He has authored "*Rattiner's Review for the CFP Certification Examination - Fast Track Study Guide*", "*Rattiner's Financial Planner's Bible*", and "*Personal Financial Planning for Divorce*" for John Wiley & Sons. He authored "*Getting Started as a Financial Planner*" for Bloomberg Press, *Financial Planning Answer Book* for CCH/Wolter Kluwers, "*Adding Personal Financial Planning to Your Practice*" for American Management Association, "*Personal Financial Planning Library*" for Harcourt Brace, and co-authored "*Practicing Financial Planning*".

He has been the editor of several prominent technical journals including *Personal Financial Planning* and *Financial Advisory Practice* for Warren Gorham and LaMont, *Financial Planning Digest* for Harcourt Brace, *Audio Financial Planning Report* for Totaltape (Bisk) Publishing Company, *Financial Planning Monthly Journal* for Aspen Publications, *The Planner* for the AICPA, and was a columnist for *Financial Planning* and *Financial Advisor* magazines.

Mr. Rattiner has been the Director of Professional Development & Corporate Sponsorship for the Institute of Certified Financial Planners (ICFP) and the Director of Technical Standards for the Certified Financial Planner Board of Standards (CFP Board) in Denver, and previously employed as Technical Manager in the Personal Financial Planning (PFP) Division of the American Institute of Certified Public Accountants (AICPA) in New York City.