Getting to know your advisor

Phillip is a Partner with Monument Wealth Strategists working through AXA Advisors as a Financial Consultant. He began his career with John Hancock as an assistant planner in 2012. He soon moved to AXA in 2013 to assume a role as a fully licensed representative. Coming from a family passionate about helping disabled individuals, his consulting focus is on planning for parents with special needs children to provide peace of mind in a changing landscape. As a fiduciary, he always acts in the best interests of his clients.

As your representative, he will analyze areas such as:

- ✓ *Estate Planning Tactics with Special Needs Trusts*
- ✓ *Maintaining and Applying for Government Benefits*
- ✓ *Wealth Building and Continued Savings*
- ✓ *Retirement Planning*
- ✓ *Retirement Distribution*
- ✓ *Wealth Protection*

Background/Personal
Phillip obtained a Bachelor of Science dual degree in Business and Psychology from the Robert H Smith School of Business at the University of Maryland. In his free time, you might find Phillip rooting for the Terps, running triathlons, spending time with family and helping in the community through volunteer associations with a focus on helping children with autism such as Autism Speaks and The Whole Self Center. One of Phillip's favorite ways to give back is by guest speaking to young adults on the spectrum at the Arc of Howard County in Maryland.

Recognition/Qualifications:
- ➢ Series 7 – General Financial Securities Representative
- ➢ Series 63 - Uniform Securities Agent State Law Examination
- ➢ Series 65 - Uniform Registered Investment Adviser Law Examination
- ➢ Series 24 – General Securities Principal Exam
- ➢ Health, Life & Variable Lines - Dept. of Insurance, Securities & Banking

Phillip is currently licensed in the following states: DC, IL, MD, NC, NJ, PA, TX, VA, & WV