



Brian Wodar

AB Bernstein Private Wealth Management

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Brian is a Senior Vice President and Financial Advisor with Bernstein Private Wealth Management. He has provided customized advice to some of Bernstein's wealthiest clients across the country in nearly every aspect of their financial lives. Brian has extensive experience with individuals, families, trusts and foundations. He joined the firm in 1997.

Prior to becoming a Financial Advisor, Brian was both National Director of Philanthropy and Director of Wealth Planning and Analysis. He trained other Financial Advisors in these areas. He has been published extensively (Trusts & Estates, The CPA Journal), has been a featured speaker at industry events (Gotham Magazine's Business of Philanthropy, Hawaii Tax Institute), and has been quoted frequently (The Chronicle of Philanthropy, USA Today). Brian also led Bernstein's largest private-client research effort to date—the creation of the Wealth Forecasting System.

Brian's expertise is wide-ranging, including the areas of investment strategy, retirement planning, wealth transfer, concentrated stock and option exposure, sales of privately held businesses, philanthropic giving and pre-immigration planning. Brian earned a BA in English from SUNY Albany, an MA in Literature from NYU and an MBA in Finance from NYU. Brian moved from Bernstein's New York office to Chicago in 2005 to lead the firm's wealth planning efforts throughout the Midwest, Southwest and Texas. He then moved to South Florida in 2013 to do the same in the Southeast. Prior to joining Bernstein, Brian was an Adjunct Lecturer at NYU and other colleges and universities in and around New York City, teaching classes in Writing, Literature and Mathematics.

Capabilities

- Asset-allocation advice
- Risk management
- Tax planning
- Retirement planning
- Multigenerational wealth planning
- Pre-immigration Planning
- Philanthropic planning
- Planning for selling a business
- Investment solutions for corporate executives
- Single stock and stock options planning
- Foundations and endowments

Community

Brian is a committee chair for the Palm Beach Philanthropy Tank and an active participant in the American Cancer Society's Real Men Wear Pink campaign. Brian

lives in Jupiter with his wife and two daughters. They are all active in tennis and equestrian sports, raising their dogs and birds, and in fostering puppies and kittens.