



hooker & holcombe



## Stuart H. Herskowitz, CRC, AIF®

Senior Vice President, Client Relations

### Experience

Stuart is experienced in many facets of the retirement planning process. As the head of client relations, he sources, coordinates and transitions new clients, ensuring their satisfaction. He actively consults with both public and private sector employers on a range of institutional retirement plan issues. As a partner of the firm, he plays a leading role in strategic planning and client relations.

Stuart joined the firm in 1996 and has more than 25 years of experience in retirement planning. Prior to joining the firm, he was vice president, practice leader with Professional Pensions, Inc.

Stuart's specialties include working with tax exempt and private sector employers to identify challenges and help them achieve their financial goals. As an Accredited Investment Fiduciary (AIF®), Stuart also consults with clients to review and assess their fiduciary processes and practices.

### Education

Stuart has a Bachelor of Science in Chemistry from William Paterson University. He also holds Series 6, 26 and 65 securities licenses.

### Professional Affiliations

Stuart is a Certified Retirement Counselor (CRC) and Accredited Investment Fiduciary (AIF®).

Check the background of this investment professional on [FINRA's BrokerCheck](#)

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