

Paul Markowich, CFP



Paul Markowich is Executive Vice President and Partner at Firstrust Financial Resources.

Paul works closely with professionals, entrepreneurs, families, and institutions to help them achieve their financial goals. He assists with designing and implementing effective investment portfolios, insurance strategies, and employee benefits.

Paul believes that education is the foundation for financial success and is a frequent presenter for professional and worksite groups, providing education on various topics for investors at all levels. When Paul is not conducting group workshops or meeting with individuals and families, he works with corporations in their corporate benefit plans. Paul has created a unique niche in not only helping employers evaluate and improve current benefit offerings, but also in communicating the benefit value proposition to employees.

Paul is a Retirement Planning Specialist, and received his Certificate in Retirement Planning from the Wharton School, University of Pennsylvania. CFP® and CERTIFIED FINANCIAL PLANNER™ are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete the CFP Board's initial and ongoing certification requirements. He also holds the Accredited Investment Fiduciary (AIF) designation.

Paul has been featured on Thestreet.com, Kiplinger's, Fox 29 "Good Day Philadelphia" and the NBC10 Tracy Davidson Show. Paul was recently named top 30 benefit advising innovators by Employee Benefit Magazine 2016. He lives in Bryn Mawr with his wife and two children.