

Brody Rosenfeld, CPA, CFP®

Brody is Foundation's Owner & Operator. As the son of a successful financial advisor, Brody grew up learning about financial planning and its importance.

He received a bachelor's degree in accounting with a minor in economics, earning Magna Cum Laude honors (3.8 GPA) from Arcadia University in Glenside, Pennsylvania. While there, he spent a semester abroad in the United Kingdom at The University of Cambridge where he studied Finance & European History.

Brody is a Certified Public Accountant, CERTIFIED FINANCIAL PLANNER™ certificant, and has a FINRA Series 65 (investment adviser) certification.

He is a veteran of TWAMS Outsourced Financial Planning where he spent 7 years creating hundreds of financial plans for a variety of advisors, managing relationships, creating Microsoft Excel driven financial planning solutions, and striving to live up to his reputation as an Excel Wizard. Brody briefly worked in public accounting before pivoting into Financial Planning.

In his spare time Brody enjoys competitive axe throwing, brewing beer, learning about history, hiking, biking, & baking bread. Brody volunteers his time every week to pick up litter in his Philadelphia neighborhood, formed a local "trash team", and volunteers with a local tree planting group. He is an avid Philadelphia Eagles fan.

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