WYNFORD GROUP ASSOCIATE:

CHRIS FORMAN

As an Investment Advisor with Berkshire Securities Inc., Chris Forman is able to help clients achieve their retirement objectives through a wide range of investment products including stocks, bonds, and mutual funds. Chris considers his true strength his ability to stay focused on long-term objectives and achieves this through the use of long-term asset allocation strategies consistent with clients' risk tolerance and retirement expectations.

Chris assists individuals and group plan members in achieving their retirement income goals with a consistent message. An effective communicator, Chris is able to help people clarify their objectives and implement a comprehensive plan to reach those goals.

Chris has an established and respected practice in the area of Retirement Income Planning and for years has helped clients convert their accumulated savings into income streams.

Over the years, countless group plan members have benefited from Chris' employee presentation series on the accumulation of wealth through a company sponsored retirement plan, many of whom have indicated that the presentations were the "best they have attended."

Chris has practical work experience and related educational reinforcement. With over 20 years of experience in the retirement and investment community, Chris handles all aspects of both group and individual retirement planning. Backing Chris' work experience is a Certified Employee Benefits Specialist Designation (CEBS). Chris also passed his Level 1 of the CFA examination in 1990.

Wynford Group

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