Jeffrey Levine, CPA/PFS, CFP®, ChFC®, RICP®, CWS®, BFA®, MSA

Jeffrey Levine, CPA/PFS, CFP®, ChFC®, RICP®, CWS®, BFA®, MSA is the Lead Financial Planning Nerd for Kitces.com and the Chief Planning Officer at Focus Wealth Partners.

In 2022, Jeffrey received ThinkAdvisor's Luminaries award for Education and Thought Leadership. Other industry recognitions include being named to Investment Advisor Magazine's IA25 in 2021 for being one of the top 25 "VIPs Pushing Advisors Forward," which followed being named to the same list in 2020 as one of the top 25 voices to turn to during uncertain times. Also in 2020, Jeffrey was named by Financial Advisor Magazine as a Young Advisor to Watch. He is a past recipient of the Standing Ovation award, presented by the AICPA Financial Planning Division for "exemplary professional achievement in personal financial planning services," and is a member of the 2017 class of 40 Under 40 by InvestmentNews, which recognizes "accomplishment, contribution to the financial advice industry, leadership and promise for the future."

Previously, Jeffrey served as Ed Slott and Company's Chief Retirement Strategist, where his ability to simplify the complex laws that govern individual retirement accounts, combined with his unique blend of humor and tax planning, was first recognized. You can follow Jeff on Twitter @CPAPlanner, where he is known to break down the latest tax updates in GIF-filled tweets storms, and via his personal website, www.FullyVestedAdvice.com.

Website and Social Media:
LinkedIn: https://www.linkedin.com/in/jeff-levine/
Twitter: https://x.com/CPAPlanner