

Northeast Planning Corporation

50 Years of Helping Clients Grow, Protect and Conserve Their Wealth



Celebrating 50 years of experience and expertise in all areas of financial planning, Cranford-based Northeast Planning Corporation (NEPC) is committed to helping individuals, families and businesses improve their long-term financial success. Backed by The Guardian Life Insurance Company of America, NEPC is one of the Tri-State area's largest, oldest and most respected independently owned financial services companies.

As a comprehensive financial services firm, NEPC employs a staff of specialists and administrative personnel who service more than 30,000 clients. The firm is recognized by GAMA International as a Master Agency, a designation given only to the country's top financial services firms.

Founded in 1964 by Al Ferrara, NEPC has a rich history of delivering a high level of personalized service, knowledge and expertise, while helping clients grow, protect and conserve their wealth. CEO Steven Ferrara, CLU, joined the organization in 1974 with a mission to evolve with client needs and changing financial times.

NEPC considers wealth building to be equal parts art and science. Utilizing the firm's patented

Purpose Driven Wealth System[®], planners work with each client to organize and coordinate the many facets of their financial world, including protection needs, taxes, investments and estate planning. Together, they develop a comprehensive strategic plan to help the client achieve their goals and objectives. This holistic approach allows NEPC to serve as the "go to" resource for everything that touches their clients' financial lives.

The firm also has a long history of partnering with the business community, working closely with companies on employee and executive benefits plans, succession planning strategies, attracting and retaining key employees, and retirement and estate planning for individuals and their families.

Responding to an increased interest in long-term financial planning, NEPC continues to shape the role it plays in the lives of its clients. The firm's relationship-focused philosophy, coupled with proprietary tools designed to help middle to upper-middle class individuals and families build wealth, uniquely position the company for growth in today's financial services marketplace. ■

COMPREHENSIVE FINANCIAL STRATEGIES
NORTHEAST
PLANNING CORPORATION

A member of  the **GUARDIAN** network

Founded: 1964

Senior Executives:
Steven Ferrara, *CLU, CEO*;
David Parsels, *CLU, ChFC, CLTC, Managing Partner*

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