Palisades Hudson Financial Group LLC

Scarsdale, NY • Atlanta, GA • Fort Lauderdale, FL • Portland, OR • Austin, TX

Comprehensive, Objective, Fee-Only Advice and Solutions

Our Mission

We strive to provide impartial information and advice that promotes our clients' financial security, the well-being of their loved ones, the satisfaction of their legal obligations, and the achievement of their philanthropic goals.

At A Glance

- Palisades Hudson provides a broad range of tax, estate, investment, and other financial planning services to professionals, senior corporate executives, closely held businesses and high-net-worth families across the United States and abroad.
- Assets under management: over $1.2 billion
- Total client relationships: approximately 200
- Number of employees: 25
- Certified Financial Planners™: 11
- Certified Public Accountants: 3
- Enrolled Agents: 7

Core Capabilities

- Asset allocation
- Investment management
- Estate planning
- Retirement planning
- Tax preparation
- Executive financial planning
- Business valuation
- Business management
- Financial reporting
- Insurance consulting
- Cross-border tax planning
- Trust planning
- Bookkeeping and bill pay
- 401(k) advisory services

Why Palisades Hudson?

- Holistic approach that takes into account a full range of financial issues
- Objective, unbiased advice
- Personalized attention and customized solutions
- Lasting relationships with clients and their families
- Fair and transparent fee schedule provided in advance
- Compensated solely by clients
- Knowledgeable and accessible staff
- Access to institutional quality investment managers

Background

- Founded in 1992 by Larry Elkin.
- Registered investment advisor affiliate, Palisades Hudson Asset Management, launched in 1997.
- Fort Lauderdale office established in 2005.
- Atlanta office opened in 2008.
- Portland office opened in 2012.
- Austin office opened in 2015.

Management Team

Larry M. Elkin, CPA, CFP®
President & Founder
Shomari Hearn, CFP®, EA
Vice President & Chief Compliance Officer
Linda F. Elkin
Director of Marketing & Human Resources
Paul Jacobs, CFP®, EA
Client Service Manager & Chief Investment Officer
Melinda Kibler, CFP®, EA
Client Service Manager
Eric Meermann, CFP®, CVA, EA
Client Service Manager
Anthony Criscuolo, CFP®, EA
Client Service Manager
ReKeithen Miller, CFP®, EA
Client Service Manager
Rebecca Pavese, CPA
Client Service Manager
Benjamin Sullivan, CFP®, EA
Client Service Manager
David Walters, CPA, CFP®
Client Service Manager
Laurie Samay, CFP®
Client Service Manager
Thomas Walsh, CFP®
Client Service Manager
Pascale Leon-Bocchino
Administrative Manager
Jeffrey J. Howard
Administrative Manager
Melissa DiNapoli
Administrative Manager
Amy Laburda
Administrative Manager
Cristina Galante
Administrative Manager