

Edward J Russo

YOUR TRUSTED
FINANCIAL COACH

Ed Russo has been involved in the financial services industry for almost a decade. He honed his craft at UBS-PaineWebber, Miller Tabak, and TIAA. At these companies, he identified investment value, benchmarked investments, managed relationships with money managers, and provided financial education.

Currently, he instructs securities exam preparation courses for financial services professionals. Playing a pivotal role in mentoring participants and driving success by providing a motivating and engaging environment.

Prior to launching his own business, he worked in a wide range of businesses, from startups to multinationals. Outside of financial services, Ed has worked in several industries including consumer goods, SaaS technology, hospitality, and consulting. He has always played a critical role in helping businesses make sound financial decisions and manage their finances effectively.

Distraught with the financial aptitude of most individuals, he set out to start an investment education firm in 1995 where he discovered a large percentage of employees didn't participate in their employee defined contribution plans. Moreover, they needed objective financial education with no product promotions or sales.

Today, his mission continues with a financial coaching company (no sales or commissions). He specializes in working with individuals who want to make empowered financial decisions, manage their debt, and attain their financial goals. His laser focus is on workshops and one-to-one consultations helping individuals understand credit, budgeting, mutual funds, tax-deferred investments, annuities, and insurance options. The joy he receives in educating and empowering others drives him. At the same time, he is humbled by the great responsibility that comes with his education work.

Ed received his BBA degree in banking and finance from Hofstra University. Additionally, he completed graduate course work at Columbia University. He has passed several securities representative examinations including the series 6, 7, and 63. Additionally, he holds a General Insurance license in the state of Texas.

Ed and his wife of 25 years reside in North Texas after living on both coasts. They have two children (one Aggie) and a precocious dog. Ed enjoys teaching, swimming, biking, cooking and serving at his church.

edwardjrusso.com