



Samuel F. Rad

FINANCIALLY EMPOWERING WOMEN COAST TO COAST

contact info

SAMUEL RAD, CFP™
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SamuelRad.com
FinancialPlanningForWomen.org



fast facts

7 Professional Licenses



[LinkedIn.com/Advisor](https://www.linkedin.com/in/SamuelRadFinancial)



[Facebook.com/SamuelRadFinancial](https://www.facebook.com/SamuelRadFinancial)

10 Institutions

12 Areas of Expertise

12 Relevant Topics

PROFESSIONAL

- Certified Financial Planner (CFP)
- Real Estate Licensee, California Bureau of Real Estate (CalBRE)
- Investment & Securities Licensee, SEC Series 6, 7, 63 and 65
- Life/Health Licensee, California Department of Insurance

EDUCATION

- University of California Los Angeles - Financial Planning
- California State University Northridge - Finance

ACADEMIC INSTRUCTOR (PAST & CURRENT)

- UCLA
- West Los Angeles Community College
- East Los Angeles Community College
- Santa Monica College
- Pasadena College
- Pierce College
- Cerritos Community College
- Los Angeles Harbor College
- LA Valley Community College
- Glendale Community College

AREAS OF SPECIALTY

- Financial Planning for Women
- Retirement Planning 2.0
- Real Estate Advice
- Social Security Maximization
- Legacy Planning, Heirs and Inheritance
- Annuities, Life insurance
- Widow & Divorce Planning
- Sudden Wealth & Lotto Advice
- Wills, Trusts, Probate
- Medicare, Medicaid
- Long Term Care
- End of Life Planning

SPEAKING TOPICS

- "Empowering Women"
- "Financial Planning for Women"
- "Retirement Secrets Everyone Must know"
- "Social Security Maximization for Couples and Singles"
- "Investment Boot Camp"
- "Financial Forecast"
- "How to Increase Your Credit Score"
- "Smart Money Fundamentals"
- "Estate Planning For Everyone"
- "How to Be a Powerful Networker"
- "Real Estate Success"
- "Financial Planning For Realtors"

focus

Sam is camera-genic and has strong voice quality. He presents well on camera or behind a microphone. His weekly show on KFWB keeps him up-to-date and lively on air.

AREAS OF EXPERTISE

Financial Planning	██████████
Real Estate Advice	██████████
Divorcee / Widow Advice	██████████
Retirement Issues	██████████

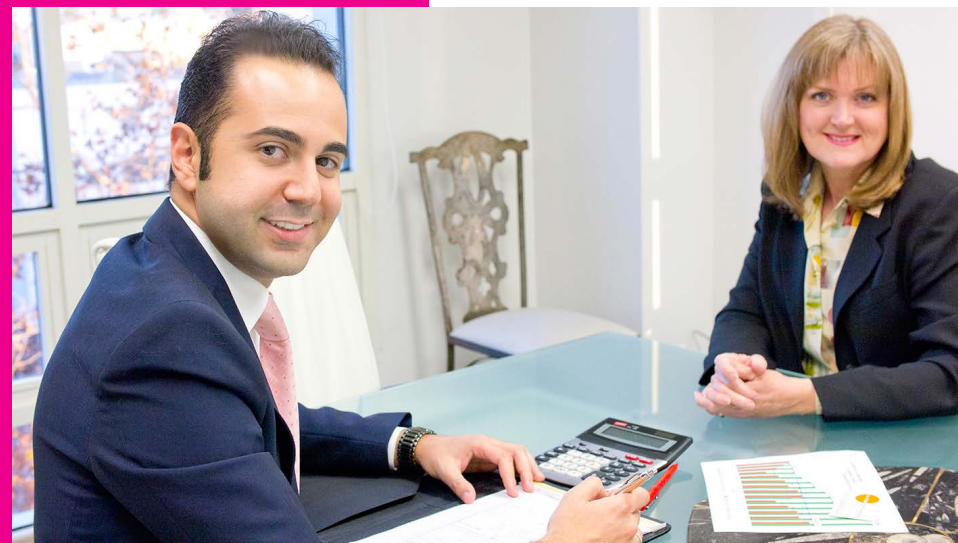
AUDIENCE

Women	██████████
Retirees	██████████
Executives	██████████

Words that fit Sam's character rather perfectly:

Creative
Flexible
Eye for detail
Social
Well Dressed
Punctual

HD-Streaming ready for on-the-spot interviews from his beautiful 90210 office.



expert

Up-to-date and ready

Samuel Rad is an educator, advisor, mentor and professional coach in the financial services industry from retirement issues to real estate and securities - with an array of current (and former) levels of SEC licensing as an investment advisor, alone.

Samuel Rad is an instructor at UCLA and trains real estate brokers throughout the Greater Los Angeles area. This Jewish-Iranian former refugee of the Ayatollah Khomeini regime is only in his thirties and has mastered uncommon expertise in three major industries, unlike almost anyone else in financial services.

For media purposes, Samuel Rad is eager to assist you with your ongoing coverage on the following sample topics:

- **Financial Planning Issues for Women**
- **How to Increase Your Credit Score**
- **Getting Out of Debt - Quick**
- **Real Estate: Is it really a good time to buy or sell?**
- **Converting/securing retirement accounts**
- **Social Security/Maximization for Couples and Singles**
- **Legacy Planning, Heirs and Inheritance**
- **Annuities, Life insurance**
- **Taxation Strategies and 'The New Normal'**
- **Wills, Trusts, Probate and Estate Strategies**
- **Planning for Medicare, Medicaid, Long Term Care**
- **Beneficiary Planning**
- **End of Life Planning**

distinctive

Not your typical financial guru



Office located in Beverly Hills, 90210

Sam is different from others in his field:

Multi-disciplinary

Mr. Rad is licensed and expert in: investments, stock market, real estate, stocks, bonds, mutual funds, life insurance, Social Security, health care – he speaks ‘Obamacare’ fluently. (Financial planners often lack much more than fill-in-the-blanks-planning software.)

Focus

Women and their unique wealth-management needs are his top priority: more than 80 percent of his current clients are women. He is renowned for addressing financial concerns related to women. His women’s seminars are well known.

Fascinating

His fascinating life story defines the “American Dream.” A former Jewish-Iranian refugee of the notorious Ayatollah Khomeini debacle, Samuel Rad and his impoverished family arrived in Los Angeles at a young age, embracing every educational and business opportunity until he reached success.

Accessible

He is HD-streaming capable right from his beautiful Beverly Hills office. Also a college instructor at UCLA, and the co-host of the “Smart Money Fundamentals” radio show on KFVB.

His practice is focused on empowering women of the middle class.

Expertise:

- Empowering Women Financially
- Divorce Planning
- Stock Market Cycles
- Real Estate Trends
- Widow Benefits
- Increasing Your Credit Score
- Social Security Maximization
- Retirement Rollovers
- Tax Tips
- Estate Planning For Everyone
- Interest Rate Reactions
- Health/Life Insurance Tips
- Annuity Talk
- Long Term Care

“A former Jewish-Iranian refugee of the notorious Ayatollah Khomeini regime with a message”

“unusual array of licensing and expertise from securities and real estate to Social Security, health and life insurance”

“passion for protecting people of all cultures from financial poverty”



media release

Women’s Financial Advocate/Diverse Expert

Tackles 2014 Economy

Beverly Hills, CA – With real estate values growing, heavy taxation pending and national health coverage on the line, regional women’s financial advocate and multi-disciplined estate-wealth planner Samuel Rad, CFP, is a former Jewish-Iranian refugee of the notorious Ayatollah Khomeini regime with a message: Safeguard and integrate your financial/taxation/real estate plan in 2014, and brace for change.

Rad stands alone with an unusual array of licensing and expertise from securities and real estate to Social Security, health and life insurance. As a once impoverished refugee of the Ayatollah’s Iran, this all-American proponent of financial freedom urges a close watch on incoming taxation with an eye on integrated estate planning, especially for women facing enormous financial responsibilities and uncommonly vast wealth in the coming years.

Both a Certified Financial Planner (CFP) and coach to thousands of Realtors from Beverly Hills to Anaheim, Rad has a passion for protecting people of all cultures from financial poverty. He should know: his family immigrated from 1970s Iran to the mean-streets of L.A. before Sam triumphed with a Cal-State degree in finance, and his electric presence at the motivational speaker’s lectern, also as a frequent radio guest-host and instructor at UCLA.

approach

Ask anyone in the wealth management field who knows Samuel Rad and they will point to his dedication to women charting the uncertain waters of wealth planning and management in today's global-economic environment. His approach to the financial services industry is based on the fact that 60 percent of American wealth resides with women, while 40 percent of women in the U.S. continue to allow their spouses to control 100 percent of their financial destinies...even though women will statistically outlive them by 9 years!

He also serves a growing contingent of men from all economic levels and professions, while helping employees from all walks of life at the Top Five motion picture companies – as they plan for the future related to 401(k)s, guaranteed income, Social Security benefits and more .

Approximately 80 percent of his clients are currently women because he has an uncommon affinity for understanding their perspectives and concerns. He prides himself in taking "all the time necessary" to thoroughly illustrate a proposed financial plan, especially when it comes to retirement.

Current Speaking Topics

"Empowering Women"

"Financial Planning for Women"

"Divorce Planning For Women"



"Social Security: How to Maximize Your Benefits"

"Investment Boot Camp"

"Smart Money Fundamentals"

"Estate Planning For Everyone"

"Financial Forecast"

"How to Be a Powerful Networker"

"Real Estate Success (for licensed Realtors only)"

FIVE KEYS to financial freedom for women

Part of Sam's approach begins with his "Five Financial Keys to Financial Freedom for Women," which include:

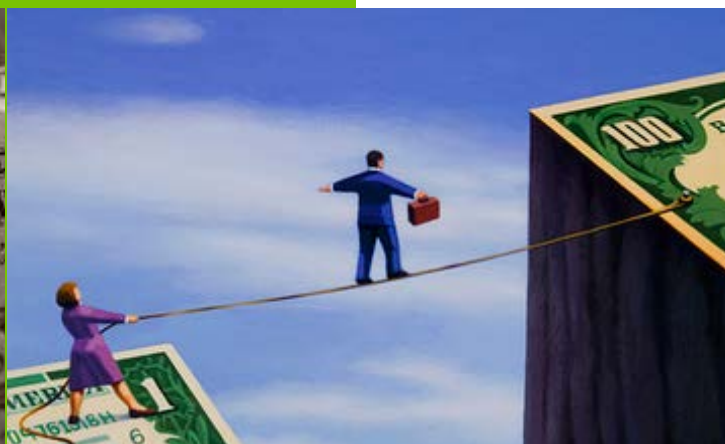
- Financial Planning for singles, widows & divorcees
- Maximizing Social Security benefits for women
- Optimizing retirement accounts
- Protecting against major Incoming Taxation due to national debt and deficit in the U.S.
- Leveraging Spousal Benefits in retirement two-fold
- Empowering women through financial education

Many of his clients currently reside in a broad geographic area ranging from Beverly Hills to Anaheim to Newport Beach, where he makes available to anyone financial strategies once reserved for large estates.

Women, in particular, have unique needs in this area, often beginning with real estate assets their husbands leave behind, which must be protected against major taxation while minimizing risk. Such strategies may incorporate anything from trusts and life insurance products to bonds and mutual funds, all depending upon individual client needs and existing situations.



Maximizing Social Security Benefits



Minimizing Retirement Risk



Protecting Your Nest Egg Against Taxes



Leveraging Spousal Benefits



Planning for singles, widows & divorcees

bio

From Political Refugee to the American Dream

The son of Persian-Jewish refugees forced to flee their Iranian homeland after Ayatollah Khomeini exiled the Shah in the 1980s, Sam was 7 when they embarked for the American Dream, leaving behind all possessions, friends and family members.

Receiving temporary asylum in Vienna, Austria, where Sam's father worked for the Jewish charity HAYAZ to help other refugees, Sam toured Auschwitz with his parents, gaining an indelible impression of life's frailty and a determination to start anew and prosper.

After emigrating to downtown L.A., where his father managed a rented retail kiosk on Broadway, Sam learned to work hard and persevere with a humble working-class background while living on the fringe of affluent Beverly Hills. Thus inspired, struggling with English as a second language as a child, he eventually worked his way through college to overcome an innate shyness, ultimately becoming an award-winning Toastmaster's speaker recognized by renowned motivational guru Tony Robbins.

Aside achieving stellar, combined careers in investment brokerage, real estate, insurance-based financial planning and more, Sam dedicates much of his time as a college instructor at UCLA and some of the colleges that helped him earn his degree in finance. Teaching a busy schedule of classes and workshops - from estate planning, women and investing, and real estate to Social Security maximization and post-recessionary investment strategies - Sam most identifies with related challenges facing women, in particular.

His financial advisory practice is accordingly focused on empowering women in the financial world, while advising employees of every persuasion among the Top Five major motion picture companies - those among a diverse and growing stable of clientele.

September 2011

Samuel Rad and President Clinton



"My passion is to spread the word – whether people care to work with me or not."

-Samuel Rad

"I'm primarily driven to save my clients from the harsh, day-to-day struggles my parents endured," Sam says, "which is now an easily achievable goal using certain financial strategies. Yet, I'm continually amazed by how few are aware of retirement-saving financial strategies available to the many, so my passion is to spread the word – whether people care to work with me or not." To do so, he now devotes much time as an instructor at UCLA and various colleges around Greater Los Angeles.

The ethic of giving without expectation frames Sam's professional life. While frequently associating with Hollywood celebrities and wealthy investors, he is welcome in affluent circles throughout southern California, having been invited to serve as financial controller and board member for LASHA, a non-profit organization dedicated to the care of Sephardic elderly.

Yet, Sam's primary focus is to help Americans of all economic levels achieve their lifestyle goals. Sam also approaches financial planning with an uncommon respect for elders. Still alarmed by damaged retirement portfolios after the post-9/11 market drop, followed by subsequent financial devastation after the Crash of 2008 – essentially destroying his own parents' retirement savings – he decided to re-invent his own brand of retirement planning.

In the New Normal of the post-recessionary era, Sam builds retirements based on minimized risk, guaranteed income for life, and the secure capture of market gains, while protecting his clients from loss due to future market corrections and economic downturns.

Sam's mastery of the latest professional tools make it work: ensuring safe, carefree retirement lifestyles for his considerable client base while minimizing client costs. He generates wealth, preserves estates and "spreads the wealth" of knowledge wherever possible, which has turned one-time refugee Sam Rad into an acknowledged rising star in the financial community of Greater Los Angeles.

May 2010

Samuel Rad receiving recognition from Tony Robbins.



October 2013

Samuel Rad with Ellen DeGeneres & Anne Hathaway



backgrounder

Samuel Rad has been an integral part of the Beverly Hills/Los Angeles financial services community since 2006 – with an expertise in financial planning for women, in particular – along with prior years in real estate training/mentoring throughout southern California, and an exhaustive teaching itinerary at nine regional colleges in the Greater Los Angeles area.

His financial seminars for the Top Five motion picture organizations include Paramount, Warner Brothers and Fox. His appearances on the popular radio show Smart Money Fundamentals, on KFWB 980 AM, reach thousands of listeners as he covers everything from real estate to broad-based investment strategies, life/health insurance to Social Security.

His unusually diverse expertise sets him apart from most other financial service professionals, offering uniquely comprehensive perspectives. He's also a trend-setter in an explosive arena: Many of his financial strategies are specifically designed for women; not surprisingly, the vast majority of his clients are women of diverse backgrounds and professions.

"People in my industry often ignore the fact that women will soon control enormous wealth in this country," Rad points out, "as both professionals in the global marketplace and as survivors with large estates. I saw this in the real estate industry and I now base my financial planning initiatives around the financial empowerment of women in a global economy."

"People in my industry often ignore the fact that women will soon control enormous wealth in this country,"

-Samuel Rad

Uncommonly Broad Expertise for All Things Financial

Highlights:

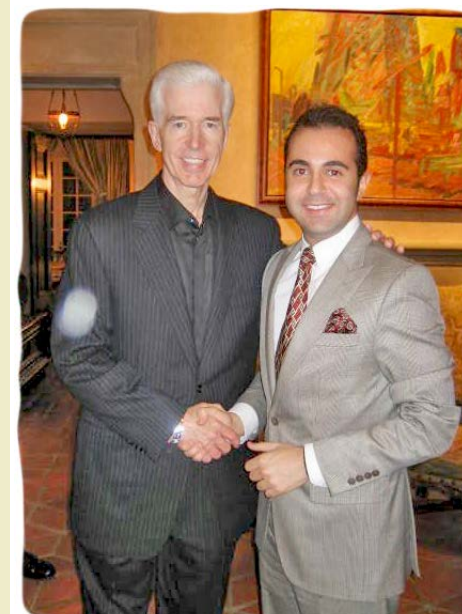
- *Has trained more than 5,000 realtors on advance topics*
- *Over 15,000 weekly radio show listeners*
- *Currently teaches at UCLA*
- *80% of clients are women*

With a Cal-State finance degree and numerous professional certifications/licenses – including the coveted Certified Financial Planner (CFP) designation – Samuel Rad is accordingly fluent in topics ranging from securities to real estate, health/life insurance to taxation and Social Security, making him the ideal, highly qualified source on everything from Obamacare to annuities.

Among an elite few with the above scope of expertise, Rad is a sought-after resource for attorneys, CPAs and leaders in the So-Cal real estate community, where he trained more than 5,000 Realtors during and following the rough and tumble Great Recession. (Sam is a fixture throughout Beverly Hills and Greater L.A. from Sotheby's International to Coldwell Banker and Keller Williams.)

With an office on Wilshire Boulevard in Beverly Hills, this Jewish political refugee from Ayatollah Khomeini-embattled Iran embodies the American Dream. He has thus become widely known for inspiring people of many nations and generations.

Currently a board member and financial controller for the Los Angeles Sephardic Home for the Aging (LASHA), also a college lecturer at UCLA and nine other institutions of higher education from West Los Angeles College to Cerritos College, Rad is a seasoned talk-show host and recognized motivational speaker, has related kudos from Toastmasters International to Tony Robbins and is HD-streaming capable for interviews from his office in Beverly Hills.



California Governor Gray Davis



Larry King



"The great aim of education is not knowledge but action."
—*Herbert Spencer (1820–1903)*