

**Kasanow & Associates:
Wealth Management
Harry G. Kasanow, CFP®
Independent Investment Counsel**



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Born

August 6, 1953 Philadelphia, Pennsylvania

Profession

Kasanow & Associates: Wealth Management—1994-Present

Wealth Management, Pensions & Retirement, Charitable Trusts, Financial Planning (Fee-only)

Certified Financial Planner—1985-1994

American Express Financial Advisors (Fee & commission)

Yale Elementary—1979-1984

Aurora Public Schools, Colorado

Teacher Gifted & Talented Grade 5

Federal Grant Recipient: "Apple Computers in Classrooms"

Graland Country Day—1978-1979

Denver, Colorado

Teacher Gifted & Talented Grade 4 and Media Specialist

Wheeler School—1974-1978

Providence, Rhode Island

Teacher Gifted & Talented Grades 3, 5 & 6

Computer Lab Founder

Education

CFP : Certified Financial Planner	1989-91 College for Financial Planning
M.Ed.: Elementary Education/Gifted & Talented <i>summa cum laude</i>	1976-78 Rhode Island College
B.A. : Elementary Education/Language Arts <i>magna cum laude</i>	1974-76 Rhode Island College
: Liberal Arts/Psychology	1972-74 Temple University

**Publications:
Quoted & Listed**

- "Start Now On 2005 Strategies For Taxes" *Honolulu Star Bulletin*, 12/30/04
- "What The Bear Market Teaches Us" *Physician's Personal Advisory*, 6/8/03 Pages 1-2
- "Meet Mr. Saver, Mrs. Spender" *Honolulu Advertiser*, 6/8/03
- "Father's Illness A Harsh Reality" *Honolulu Advertiser*, 6/1/03
- "Options For Long-Term Care Here" *Honolulu Advertiser*, 6/1/03
- "When Your Clients Are Your Family" *Morningstar Advisor.com*, 1/22/03
- "Aloha: Doing It Hawaiian Style" *Financial Planning (Australia)*, 1/03 Pages 23-24
- "2003: Advice From The Experts" *Physician's Personal Advisory*, 12/02 Pages 1-2
- "Planning and Living Are Not Mutually Exclusive" *Money Management (Australia)*, 11/21/02 Page 28
- "All In The Ohana" *NAPFA Advisor*, 11/02 Pages 23-24
- "10 Truths To Invest By-Principles For Good Times and Bad" *Physician's Personal Advisory*, 4/02 Pages 2-3
- "Plenty of Dangers Remain For Bear Market Investors" *Wall Street Journal*, 2/19/02 Getting Going
- "Experts Paint a Hopeful Picture" *Physician's Personal Advisory*, 12/01 Page 8

**Publications:
Quoted & Listed**

- “End The Year Profitably With These Strategies”** *Physician’s Personal Advisory*, 10/01 Pages 1-2
- “Big Bets on Stocks Create Big Losers”** *Wall Street Journal Sunday*, 10/21/01 *Getting Going*
- “Advisers Work to Reassure Investors—Email, Advisories Try to Stop Panic Before Trading Starts”** *USA Today*, 9/13/01 Page B-4
- “How to Deal Financially With Divorce, Treating It as a Business Transaction”** *Wall Street Journal*, 6/24/01 *Getting Going*
- “Tax-Relief Check Could Be Worth More”** *USA Today (online)*, 6/5/01
- “Harry Kasanow, CFP…Takes Client Service to the Highest Levels”** *Journal of Financial Planning (online)* 2/5/01
- “Take Simple Steps to Ensure Your Life Won’t Be Spent Worrying About Money”** *Wall Street Journal Sunday*, 9/10/00 *Getting Going*
- “Plans for a Distant Retirement”** *Mutual Funds Magazine*, 7/00 Page 82
- “Embracing the Competition”** *Financial Planning*, 4/00 Page 124
- “How To Prepare for a Major Fall”** *Wall Street Journal Sunday*, 1/16/00 Page D6 *Getting Going*
- “What’s the Buzz with Individual Stocks?”**: *Journal of Financial Planning*, 1/00 Page 62
- “Students of the Council: Client advisor councils can teach planners a lot about how to market their practices and strengthen their client relationships”** *Financial Planning*, 12/99 Page 110
- “Funding Retirement”** *Mutual Funds Magazine*, 11/99 Page 77
- “How do you advise a client who has received an unexpected windfall? What are the most important steps to take initially when this situation arises?”** *Advisor News Waterhouse Institutional Services*, 9/99 Page 7
- “WHZ-101: Selecting your investment objectives”** *theWhiz.com (online magazine)*, 6/13/99
- “Values Investing”** *Barron’s*, 7/5/99 Page F22
- “Investors’ Game: The Price is Right”** *Wall Street Journal*, 6/29/99 Page C1 *Money & Investing: Getting Going*
- “Allocators Anonymous”** *Financial Planning Interactive*, 6/1/99
- “Brave New Web: Using the Internet to forge high-tech, long-distance relationships with clients”** *Financial Planning*, 4/99 Page 109
- “Living Beneath Your Means: Here Are a Few Tips to Help You Spend Less”** *Honolulu Star-Bulletin*, 12/28/98 Page D1
- “Painless Ways To Live Beneath Your Means”** *Wall Street Journal*, 12/8/98 Page C1 *Money & Investing: Getting Going*
- “Buy-Sell-Hold: A Time To Sell?”** *Mutual Funds Magazine*, 12/98 Page 91
- “Smart Saving: Start Building a Nest Egg by Modifying Your Behavior a Bit”** *Honolulu Star-Bulletin*, 8/31/98 Page D1
- “Saving Money Really Isn’t So Difficult, If You Can Modify Your Behavior a Bit”** *Wall Street Journal*, 8/25/98 Page C1 *Money & Investing: Getting Going*
- “Stupid Is As Stupid Invests: Financial Advisers Share Some of the Twisted Logic They’ve Heard From Clients”** *Honolulu Star-Bulletin*, 8/10/98 Page C1
- “I’ll Sell The Stock As Soon As The Price Goes Back Up and Other Sorry Sayings”** *Wall Street Journal*, 8/4/98 Page C1 *Money & Investing: Getting Going*
- “What Seems Credible Isn’t Always True”** *Wall Street Journal*, 6/30/98 Page C1 *Money & Investing: Getting Going*
- “Experts Help Callers Plot Early-Exit Strategy/Pros Warn Against Stock-Heavy Portfolio”** *USA Today*, 5/20/98 Page 7B *Money: Retirement Planning Hotline*
- “An Ounce of Prevention Can Ward Off Financial Desperation”** *Honolulu Star-Bulletin*, 3/3/98 Page D5
- “Planning the Payments on Paradise”** *Honolulu Star-Bulletin*, 10/13/97 Front Page and Page C1
- “Retirement Uncertainty Spurs Thousands To Call”** *Planning Matters* 7/96 Vol. 1, No. 7 Page 6
- “Fan Dance”** *Dow Jones Investment Advisor*, 7/96 Page 75
- “Planner Suggests A Course In Diversification”** *USA Today*, 6/3/96 Page 3B
- “Making The Fee-Based Transition”** *Financial Planning*, 5/96
- “You’ll Need \$1 Million To Retire”** *USA Today*, 5/8/95 Page 2A
- “Callers Get Lowdown On Retirement Investments”** *USA Today*, 5/24/93 Page 7B

Speaking/Teaching Engagements

- “Cross-Border Planning Issues” FPA National Conference-San Diego, CA 9/05
 - “Financial Advice for Alternative Couples” University of Hawaii Manoa -Office of Lifelong Learning 8/26/04
 - “Stock Selection - Using Warren Buffet’s Way” University of Hawaii Manoa -Economics Club 4/8/04
 - “Wealth Management Hawaiian Style: Taking Your Practice and Your Life to the Next Level” FPA Australia 2002 Success Forum: **Keynote Speaker** 11/22/02 Sydney, Australia.
 - “Managing Your Practice to Have a Fulfilling Life” Presentations to clients of Credit Suisse Asset Management 11/13-20/02 Melbourne, Adelaide, Perth & Sydney, Australia.
 - “Basic Entrepreneurial Investment Strategy” University of Hawaii Manoa -Entrepreneurship Club 3/12/02
 - “Practice Management Issues Relating to Managing a Fee-Only Global Practice” Presentation to clients of Credit Suisse Asset Management 12/6-9/00 9th Annual FPA National Conference Melbourne, Australia
 - “Panel Discussion with Resource Associates” NAPFA 2000 National Conference 5/3/00 Minneapolis
 - “Managing a Fee-Only Advisor Practice” Professional Investment Services Conference for Australian Financial Advisors 4/11/2000 Honolulu
- International Association for Financial Planning (IAFP)**
1997-99-Chapter Advisory Council, Institute for Chapter Leadership Task Force, Faculty for Regional Chapter
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Media Broadcast

- “Tom Rulon’s Estate Planning Show” Featured Guest on Thomas A. Rulon, Esq. Live radio show in Honolulu. Aired on 6/29/02 on news radio KHVH 65 AM
 - “Estate/Financial Planning Hour” Featured Guest on Thomas A. Rulon, Esq. Live radio show in Honolulu. Aired on 12/13/00 on news radio KHVH 65 AM
 - “Holistic Planning” A taped web broadcast on www.Pavilion.com with host Karen Aroian discussing **Kasanow & Associates** Financial Planning Practice and our approach to Wealth Management. Aired in 2 parts on 12/21-22/00 (Retrievable in Pavilion.com’s archives.)
 - “Fox On Money: Your Money Matters” Featured Guest on Fox News Television. 8/1/98
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Professional Recognition

- “150 Best Financial Advisors for Doctors” *Medical Economics Magazine* 11/06
 - “Top 100 Wealth Advisors” *Worth Magazine* 10/06
 - “150 Best Financial Advisors for Doctors: Our Exclusive List” *Medical Economics Magazine* 11/19/04
 - “Hear From Worth’s Top-Rated Financial Planners” *College for Financial Planning* 3/03 Audio Tape Session
 - “150 Best Financial Advisors for Doctors: Our Exclusive List” *Medical Economics Magazine* 12/9/02
 - “In Them We Trust: The 250 Best Financial Advisors in America” *Worth Magazine* 7-8/02 Page 52 (only advisor in Hawaii)
 - “Best Advisors, Best Advice: The 250 Best Advisors” *Worth Magazine* 9/01 Page 76 (only advisor in Hawaii)
 - “The 150 Best Financial Advisors for Doctors” *Medical Economics Magazine* 8/7/00 Page 140
 - “Smart Moves From the 250 Best Financial Advisers” *Worth Magazine* 9/99 Page 95 (only advisor in Hawaii)
 - “The 300 Best Financial Advisers” *Worth Magazine* 9/98 Page 95 (only advisor in Hawaii)
 - “The 120 Best Financial Advisers for Doctors” *Medical Economics Magazine* 7/27/98 Page 120 (only advisor in Hawaii)
 - “The Best 250 Financial Advisers in 1997” *Worth Magazine* 10/97 Page 128 (only advisor in Hawaii)
- Admitted To The Registry Of Financial Practitioners** *International Association of Financial Planners (IAFP)* 5/12/93
- Colorado State Teacher Of The Year- Finalist** Colorado Department of Education 12/81

Professional Associations

The Financial Planning Association (FPA) :

Since 1/00: National and Hawaii Chapter (formally IAFP and ICFP)

The National Association of Personal Financial Advisors : NAPFA

Since 12/97: Buffalo Grove, Illinois

The Institute of Certified Financial Planners : ICFP

12/91-12/99: Denver and Hawaii Chapter

International Association for Financial Planning : IAFP

4/85-12/99: Atlanta and Hawaii Chapter

Community and Professional Services

Cinema Paradise: Board of Directors 05

FPA: Global Advisory Council 03-05

FPA: Asia Pacific Geographic Focus Group 02-07 Chairperson 03

FPA: Hawaii Chapter Board of Directors - Education Coordinator 02

Iona Contemporary Dance Theatre: President, Board of Directors, Finance Committee 00-02

Advisor to the Board of Directors 03-07

Hawaii International Film Festival (HIFF): Film Selection, Development and Foundation Committees, Board of Directors 94-98

Hawaii Kidney Foundation: Investment Advisor 93

Very Special Arts Hawaii: Board of Directors 92-93

Hawaii Nature Center: Investment Advisor 92

IAFP National: Registry Advisory Council, Foundation Investment Committee, Practice Knowledge Exam, Advisory Task Force 92-95

IAFP Hawaii Chapter: President, Board of Directors, Education Coordinator, Programs Director 86-94

Rocky Mountain Greenpeace: Board of Directors, Treasurer, Fundraising Events Coordinator 81-84

Special Interests

Photography, World Travel, Computers, Movies, Music, Cooking, Flowers, Orchids, Gardening, Post-Modern Art, Outrigger Canoeing/Paddling, Blown Glass, Skiing, Mountain Biking, Hiking, Pottery, and Poetry

Photographic Exhibitions

50 Photos from My Lifetime: Art House at Restaurant Row-Honolulu, Hawaii 10/03

Women on My Mind: Pegge Hopper Gallery-Honolulu, Hawaii 8/05

As the World Changes: Gallery East—Sydney, Australia 11/07