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“My goal is to build risk adjusted portfolios that enable my clients to accumulate, and then enjoy, their retirement savings!”

BOB SULLIVAN *CMFC[®], CIMC[®], CIMA[®]
financial advisor*

MY STORY

Bob Sullivan joins Allen & Company with an expansive career in Financial Services that spans over three decades and includes a comprehensive knowledge of products and services.

In his leisure, Bob is engaged in any number of activities ranging from boating, fishing and golfing to fundraising. Bob uses his love of golf to give back to his community as a member of the Copperhead Charities Board for the upcoming Valspar PGA Championship at Innisbrook Resort in Tarpon Springs, FL.

A native of Rye, New York, Bob came to Florida over forty years ago and lives with his family in Clearwater. He graduated from the University of Florida with a major in Finance with a B.S. in Business Administration and was a member of the Pi Kappa Phi Fraternity. Bob has served as the President of the St. Pete Stock and Bond Club and holds the CMFC[®], CIMC[®] and CIMA[®] designations in addition to his Series 7 and 63 licenses and Life, Health and Variable Annuities.



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