

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us



**Robert Westley, CPA, CFP, PFS – 2020 40 Under 40 Honoree**

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Robert is frequently sought after as a wealth management and tax expert in the national financial media and has been featured in the Wall Street Journal, New York Times, Barron's, Washington Post, Chicago Tribune, CNBC, Market Watch, Kiplinger, and USA Today. He has authored many articles and columns for professional journals including the Journal of Financial Planning, Journal of Accountancy, and The Tax Adviser.

Robert was a recipient of the AICPA's Standing Ovation Award for his exemplary professional achievement in personal financial planning services. Robert was also recently named to the 2020 class of InvestmentNews' prestigious 40 Under 40, which recognizes "accomplishment, contribution to the financial advice industry, leadership and promise for the future."

### **Community Outreach:**

Robert volunteers as a member of the AICPA's National CPA Financial Literacy Commission. The commission leads the CPA profession in a national effort to advance the financial literacy of Americans. As a volunteer, he works to raise awareness of the importance of financial literacy education, helps to build liaisons within the financial literacy community, and serves as a media spokesperson promoting financial literacy. He also volunteers his time advancing the knowledge of younger financial planners through his work on the PFS Credential Committee and the American College of Financial Services NextGen Advisory Board.

[See all of the 2020 "40 Under 40" honorees.](#)

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us