

Susan L Hartman, JD, CWPAC®, CDFA®, CRPS®, CFP®

Susan L Hartman, PLLC

Admitted in Florida & Texas

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Jacksonville Beach, FL 32250

BIOGRAPHY

Background

Susan Hartman has over 31 years of experience with estate and tax planning, investments, investment vehicles, qualified retirement plans, and comprehensive financial, asset protection, as an attorney in private practice and at the financial advisor, financial planner, wealth strategist and supervisory levels. She has conducted over one hundred presentations, classes, and workshops on financial planning and retirement plans for a variety of audiences composed primarily of financial professionals, CPAs and attorneys nationwide.

Current Practices

Financial Advisor: Specializing in individual and small- to mid-sized business owner planning

Attorney: Practice limited to wills, trusts, estates, probate and divorce

Current Licenses

FINRA Series 7 – General Securities Representative

FINRA Series 66 – Uniform Combined State Law Examination

FINRA Series 9/10 – General Securities Sales Supervisor

Florida Life, Health and Variable Insurance Producer

Member in good standing of The Florida Bar, The Texas Bar, the ABA and other associations

Formal Education

Associate of Arts, St. Petersburg College, est. 1990

Bachelor of Science in Finance, University of South Florida, 1993

Juris Doctorate, Stetson University College of Law, 2000

Current Certifications & Designations

Certified Private Wealth Advisor®, 2010

Certified Divorce Financial Analyst®, 2013

Certified Financial Planner®, 2003

Investment Management Consultant, 2012

Certified Retirement Plan Specialist®, 2019

Family Law Mediator, 2019 (to present)

Related Employment History

Susan L Hartman, Inc 2013 - Present

(DBA Raymond James Financial Services)

Brokerage Office Branch Owner & Manager

Raymond James Financial 2001 – 2013

Senior Wealth Strategist (*home office staff*)

Matthews Benefits Group, Inc. (*successor firm to prior employer*) 1995 – 1998

Senior Retirement Plan Administrator and ERISA Consultant

John R Winton & Associates of Florida, Inc. (DBA RJFS) 1993 – 1995

(DBA Raymond James Financial Services)

Retirement Plan Administrator and ERISA Consultant

Related Activities

Co-President, past President, **Collaborative Family Law Association of Northeast Florida**

Member, past Secretary, of the **Jacksonville Beaches Bar Association**

Member, past Secretary, the **Ponte Vedra Woman's Association**

Member, the **Jacksonville Bar Association**