



Madison Planning Group, Inc.
4 New King Street, Suite 120 • White Plains, NY 10604
Telephone: 800.222.2091 • Fax: 800.249.9403

CLIENT SERVICES

***NINA OCCHINO-MELITO – DIRECTOR OF NEW BUSINESS**

nocchino@MadisonPlanning.com

- Processing of Insurance
- General Inquiries & Client Correspondence



***GABRIELLA B. KEARNEY – ASST. DIR OF NEW BUSINESS**

gbermudez@MadisonPlanning.com

- Investment: Transfers & Processing
- General Inquiries & Client Correspondence



***JULIE ABATO – ADMINISTRATIVE ASSISTANT**

jabato@MadisonPlanning.com

- Scheduling of Appointments & Seminars
- Client Correspondence



CLIENT PLANNING SERVICES

ANDREW FEDERICO – DIRECTOR OF PLANNING

afederico@MadisonPlanning.com

- Financial Proposal Development
- Investment Strategies
- Portfolio Administration
- Financial Presentations
- Insurance Proposals



SABER AGGOUB – PLANNING SPECIALIST

saggoub@MadisonPlanning.com

- Financial Proposal Development
- Investment Analysis
- Investment Funds & Disbursements



OPERATIONS

DEAN MCBETH – CHIEF FINANCIAL OFFICER

dmcbeth@MadisonPlanning.com

- Accounts Payable / Receivable
- Human Resources / Business Development



BEN SCHWARTZ – CHIEF OPERATING OFFICER

bschwartz@MadisonPlanning.com

- Marketing Coordination
- Website Management
- Online Account Access Liaison

