



**Zachary Golen, AIF®, C(k)P®**

*Partner & Retirement Plan Specialist*

**Broad Street Financial LLC**

Zack has specialized in the 401(k) and retirement plan marketplace since 2005, representing businesses and non-profit organizations. He has maintained a focus on serving the needs of small to medium-sized businesses with their employee engagement needs. Zack's specialty is providing education to plan sponsors and participants, offering an "end-to-end" worksite financial advice solution that includes marketing, wellness assessments, calendaring, action planning, group session content, participant surveys and employer reporting.

As Zack has grown his practice over the last 18 years, he's worked to stay ahead of the curve to provide his clients with the best service he can. As an Investment Advisor Representative (IAR), Zack's primary focus is retirement plans for small and mid-sized companies and non-for-profits. IARs have a fiduciary duty to their clients, which means they have a fundamental obligation to provide investment advice that always acts in their clients' best interests. Working with institutions across the country, Zack holds licenses for insurance in 14 states and is registered to offer securities in 20 states. In 2020, Zack was named one of Financial Times 401 Top Retirement Advisers. The list recognizes the top financial advisers who specialize in serving defined contribution (DC) retirement plans across the U.S and represents an impressive cohort of elite advisers.

In his quest for continued education and continuing to offer his clients the best level of service, Zack obtained the Accredited Investment Fiduciary (AIF®) and Certified 401(k) Professional (C(k)P®) designations. When he's not serving the needs of his clients, Zack is hard at work serving his community. From helping his fellow advisors, to furthering the growth and development of entrepreneurs, to helping young professionals find their philanthropic calling, Zack is busy engaging with the members of his community and inspiring others to live their future vision today.