NAVIX CERTIFIED CONSULTANT

Clark Bellin

Clark Bellin is an independent Consultant with the NAVIX exit planning network.

Clark serves his clients' business and personal financial goals with specialized experience in building portfolios, tax-effective investments, retirement planning, estate planning and business exit planning strategy.

As one of fewer than 7000 consultants to hold the Certified Investment Management Analyst (CIMA) designation, administered by the Investment Management Consultant Association and taught in conjunction with the Wharton School of Business, Clark undergoes rigorous ongoing education for re-certification every two years. He also is a Certified Investment Management Consultant (CIMC) with training provided by George Washington University, and a Certified Private Wealth Advisor (CPWA) taught in conjunction with the University Of Chicago Booth School Of Business. The CPWA designation is one of the premier credentials for professionals who work with high net worth clients. Clark is a registered representative and an investment advisor representative with NFP Advisor Services, LLC.

The Exit Planning Institute (EPI) has also certified Clark Bellin with the designation Certified Exit Planning Advisor (CEPA). Clark has completed the Institute's intensive CEPA five day executive style MBA program at the University Of Chicago Booth School Of Business. He is one of an elite group of business advisors to receive this designation. The CEPA program is the most widely accepted and endorsed program of its kind in the world.

Clark's insight is regularly requested for both print and broadcast media throughout Nebraska and the nation. He has appeared in national publications while also serving as the local financial spokesperson for the ABC affiliate in Omaha.

He has been honored in Omaha's 40 Under 40 and is board chairman of the Community Services Fund of Nebraska. He is also currently a board member of Nebraska Appleseed and the Lincoln Lacrosse Association Board and has been a member of Vistage International for five years. Clark graduated from Nebraska Wesleyan University with a BS in Business. He is a member of the Investment Management Consultants Associations and the National Association of Insurance and Financial Professionals.