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CONFERENCE

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Rob Wrubel, CFP® AIF® AEP®
Senior Vice President



Rob Wrubel works with individuals, nonprofit organizations and businesses on financial planning including, asset management and protection, special-needs planning, wealth transfer and business retirement plans.

His middle daughter has Down syndrome and he is recognized as a leading expert on planning for families with special-needs members. Rob is the award-winning and best-selling author of *Financial Freedom for Special Needs Families* who speaks regularly to family organizations serving people with developmental disabilities as well as to groups of professionals serving adults with developmental disabilities and their families.

Rob volunteers his time through his direct support of several organizations. He currently serves as Vice-President of the Pikes Peak Community Foundation Board of Directors. He served on the Cheyenne Village Board of Directors where he acted as Board President. Rob has served on the Board of Directors of the Colorado Springs Down Syndrome Association, as President of the Board of Directors for CASA of the Pikes Peak Region, on the Ronald McDonald House Charities Board of Southern Colorado as Treasurer, the Board of the Colorado Fund for People with Disabilities and The Children's Hospital at Memorial Hospital's Parent Advisory Committee. He has had the great pleasure to be involved in the successful completion of a capital campaign to restore the Pikes Peak Library's historic Carnegie Library.

Rob holds the Certified Financial Planning (CFP®) designation, the Accredited Investment Fiduciary® (AIF®) designation from Fi360 and the Accredited Estate Planner (AEP®) designation from the National Estate Planning Council. Rob holds the following professional licenses: Series 4, Series 7, Series 9, Series 10, Series 24, Series 53 and Series 66 and an Insurance license for Accident and Health, Life and Variable Products. He also holds a Certification in Long Term Care Insurance.

Rob is a 20-year resident of Colorado Springs, Colorado and a father of three. In his leisure time, he enjoys hiking, running trails and other outdoor activities. Rob graduated from Wesleyan University where he earned his BA and MA. He is also a 1999 graduate of the Colorado Springs Leadership Institute.