



INSIGHTS

Speaker Biography

Dr. Gregory Kasten
MD, MBA, CFP®, CPC, AIFA®
Founder & CEO
Unified Trust Company

Dr. Gregory W. Kasten, Founder & CEO of Unified Trust Company, has published more than seventy-five papers on financial planning and investment-related topics in various financial and business journals; written two editions of the book Retirement Success; and in 2005 he co-authored the first place winning paper entitled: "Post Modern Portfolio Theory" and presented the paper at the Financial Planning Association national meeting. Dr. Kasten has given dozens of lectures on fiduciary best practices to pension professionals and Federal banking regulators. Under Dr. Kasten's leadership, Unified Trust created the UnifiedPlan®, the Unified Fiduciary Monitoring Index®, and the Unified IncomePlan®.

In 2007-2009, Medical Economics listed Dr. Kasten as one of "The 150 Best Financial Advisers for Doctors" in the country. In 2011 Dr. Kasten was inducted into the Advisor Hall of Fame by Research Magazine. He has more than twenty-five years of investment experience and has been with Unified Trust since he founded it in 1985.

