RICHARD SHAKTER

JD, CLU, AIF®, CFP®

Richard is a founding principal member of Financial Compass Group, LLC and co-creator of The Panoramic Process, a financial behavior strategy based on risk-assessment and tax-tactical strategies. Since transitioning from the legal profession in 1990, Richard has been tirelessly working with business owners, individuals, and families to assist them in recognizing their full economic potential. Through financial planning in the areas of insurance, retirement, investments, and estate planning strategies, he creates programs that allow his clients to reach their financial goals and experience a better quality of life.

Richard is a highly sought-after speaker to accountant and insurance groups, covering such topics as retirement planning, insurance concepts, investing, and estate planning strategies. A natural-born teacher, Richard also served on the faculty of the Certified Financial Planner program at Boston University for several years, where he taught the risk management/insurance course.

Believing in and practicing the ideal of maximizing individual potential, Richard has participated in two outstanding coaching programs: The Strategic Coach™ and Peak for Excellence™. Each program uniquely assists Richard in maximizing the level of service he and his organization bring to their clients while helping them to pursue the things in life that they are most passionate about.

Richard's interests outside of work also have a significant impact on those around him, as seen through his contributions as a member of the Maccabi USA soccer team. His active participation as well as financial and mentoring support in this non-profit organization helps to enrich the lives of Jewish youth in the United States while embodying the Maccabi ideals of Jewish continuity and cultural identity through excellence in sport.

As an active participant in life, Richard enjoys being on the go, whether it's experiencing new places while traveling, challenging himself with athletic endeavors, or watching Boston University hockey games with friends. Professionally, Richard's impressive credentials also include receiving his Juris Doctor and Master of Business Administration from Boston University. He is a member of the Bar in the Commonwealth of Massachusetts and the State of New York.

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