

Jacob H. Gold

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Executive Profile

An accomplished CERTIFIED FINANCIAL PLANNER™ that brings extensive private sector experience to the college classroom and utilizes academic research to create investment strategies for private investors.

Professional Experience

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|------------------------------|--|---------------------|
| August 2015
to
Current | Arizona State University
Faculty Associate Professor of Finance
Currently teaches Personal Financial Management (FIN 380) for W.P. Carey School of Business. | Tempe, Arizona |
| July 2000
to
Current | Jacob Gold & Associates, Inc.
President & Chief Investment Officer
Jacob Gold & Associates, Inc. is a wealth management boutique firm that provides investment strategies to major corporations and affluent individuals. | Scottsdale, Arizona |
| January 2002
May 2006 | Instructor at various Maricopa Community Colleges
Taught a finance course that covered the fundamentals of money management, taxation and estate planning. <ul style="list-style-type: none">• Scottsdale Community College• Paradise Valley Community College• Glendale Community College• Chandler-Gilbert Community College• Mesa Community College | Phoenix, Arizona |

Books:

- **Money Mindset: Formulating a Wealth Strategy in the 21st. Century**
Wiley, 2015. ISBN: 978-1-119-13605-7
- **Financial Intelligence: Getting Back to Basics After an Economic Meltdown**, Sterling & Ross Publishers, 2009. ISBN: 978-0-9821391-3-4

Articles:

- **The Huffington Post**, March 8, 2016. 3 Very Good Reasons To Pursue an Encore Career in Retirement
- **The Huffington Post**, January 22, 2016. How to Make the Most of Your Workplace Retirement Plan
- **The Huffington Post**, December 9, 2015, 5 Ways o Teach Your Child Good Savings Habits.
- **U.S. News & World Report**, May 28, 2015. 3 Steps to Get Your Financial Life on Track.
- **U.S. News & World Report**, April 13, 2015. 3 Common Money Mistakes to Avoid Retirement.
- **U.S. News & World Report**, March 16, 2015. A purposeful Retirement Plan for 30-Somethings.
- **U.S. News & World Report**, February 3, 2015. Look Beyond Short-Term Investment Patterns.

- **U.S. News & World Report.** December 22, 2014. 3 Financial Questions Millennials Should Ask Themselves.
- **U.S. News & World Report.** November 24, 2014. Give Thanks for These 3 Tax Tips.
- **U.S. News & World Report.** November 10, 2014. 3 Ways to Rethink Retirement for Millennials.
- **The Huffington Post,** March 8, 2016. 3 Very Good Reasons To Pursue an Encore Career in Retirement
- **Newsweek,** January 1, 2010. Hank Paulson Miscalls the Recession
Television Commentary
- **Investment Advisor Magazine,** December 2010. Model Service
- **AZ Business magazine,** Dec/Jan 2007. Open for Business
- **BizAZ magazine,** March/April 2006. Defining Retirement

Contributions/Quotes:

- The Wall Street Journal
- The New York Times
- The Los Angeles Times
- The Chicago Tribune
- The Arizona Republic
- The Associated Press
- TIME
- Money Magazine
- U.S. News & World Report

Television Appearances

- CNBC
- Fox Business
- ABC News
- CBS 5 - KPHO
- ABC 15 - KNXV
- FOX 10 - KSAZ
- 3TV - KTVK

Awards

- **Advisor of the Year Finalist**, Boomer Market Advisor Magazine, May 2009
- Named as one of the "**Top 250 Wealth Advisors**", Worth magazine, October 2008
- Named as one of the "**Most Dependable Wealth Managers of the Southwest**", Forbes, Dec. 2007
- Named as one of the "**Top Independent Investment Advisors**", Phoenix Business Journal, August 2007
- Named as one of "**America's Best Financial Planners**", Consumer Research Council of America, 2005-2006 Edition
- Named as one of the nation's "**Top Advisory Firms**", Wealth Manager Magazine, July 2007

Certifications

CERTIFIED FINANCIAL PLANNER™

FINRA Series 7, 66 and 24 securities registered

Education

2002	Arizona State University	Tempe, Arizona
	Interdisciplinary Studies; Economics & History	

Languages

Bilingual Spanish/English

Community Service

Leukemia and Lymphoma Society, Board of Trustee, Desert Mountain States Chapter, 2001-2006

Leukemia and Lymphoma Society, Vice-President, Desert Mountain States Chapter, 2006-2007

Leukemia and Lymphoma Society, President, Desert Mountain States Chapter, 2007-2009

Junior Achievement, Volunteer, 2001-2002