

CURRICULUM VITAE

Edward J. Barrett
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EDUCATION

Bachelor of Science in Economics and Political Science, University of Massachusetts, MA, 1974.

Professional Designations and Certifications: Certified Financial Planner (CFP®), Chartered Financial Consultant (ChFC®), Chartered Life Underwriter (CLU®), Certified Employee Benefit Specialist (CEBS®), Retirement Plans Associate (RPA), Chartered Retirement Plans SpecialistSM (CRPS®), and Chartered Retirement Planning CounselorSM (CRPC®).

PROFESSIONAL EXPERIENCE

Founder, President and CEO, Broker Educational Sales & Training, Inc. (BEST), New Port Richey, FL. 1986-Present

Account Executive and Estate and Business Insurance Specialist for the New England Region, Merrill Lynch, Boston, MA. 1984-1985

Registered Representative and District Sales Manager, Investors Diversified Services (IDS), Boston, MA. 1974-1983

COURSE MATERIALS

“Estate Planning” – EJB Financial Press, Inc. (updated 2018)

“Long-Term Care Insurance” – EJB Financial Press, Inc. (updated 2018)

“Retirement Plans for Small Businesses” – EJB Financial Press, Inc. (updated 2018)

“The Advisor’s Guide to 401(k) Plans” – EJB Financial Press, Inc. (updated 2018)

“The Advisor’s Guide to Annuities and Ethical Practices” – EJB Financial Press, Inc. (updated 2018)

“The Advisor’s Guide to IRAs” – EJB Financial Press, Inc. (updated 2018)

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COURSE MATERIALS (continued)

“The Advisor’s Guide to Medicare” – EJB Financial Press (updated 2018)

“The Advisor’s Guide to Retirement Planning” – EJB Financial Press, Inc. (updated 2018)

“The Advisor’s Guide to Social Security Benefits” – EJB Financial Press (updated 2018)

“Understanding Social Security, Medicare and Government Benefits” – EJB Financial Press, Inc. (updated 2018)

TRAINING PROGRAMS

401(k) Primer

Advanced Life Insurance Strategies

Business Insurance Planning

Ethical Practices for Insurance Producers

IRA Beneficiary Planning

IRA Distribution Planning

IRA Planning

Managing Retirement Income

Suitability of Annuities

Understanding Medicare and Medicaid

Understanding Social Security

Wealth Transfer Planning

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SPEAKING ENGAGEMENTS

SUPER CE NATIONAL & REGIONAL CONFERENCES

Merrill Lynch:

- March 12-14 – Advanced Education Symposium, Orlando, FL
- April 25-27 – Insurance Accreditation Program, Houston, TX
- May 07-09 – Retirement Symposium, Orlando, FL
- June 11-13 – Advanced Education Symposium, Orlando, FL
- September 24-26 – Advanced Education Symposium, Orlando, FL
- November 12-15 – Advanced Education Symposium, Orlando, FL