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| Since graduating from Rutgers University in New Jersey in 1985 with a Bachelor of Science degree in Business Management, I have spent the last 35 years committed to helping my clients make well-informed decisions about their money to help enable them to achieve all that is most important to them. My early life experiences of losing my mother to cancer at the age of 4 years 11 months old, and overcoming other adolescent adversities, has helped shape my strong faith and my positive outlook on life. My early life spiritual awakening at age 21, helped spur a great desire to seek out the answers to the big questions of purpose and meaning in life. I have included our team video which outlines my values and purpose in our practice and life. https://advisor.morganstanley.com/the-bitterly-group With this quest, I have become a lover, voracious reader and contemplator of the great wisdom teachers and wisdom books including the Bible, Bhagavad Gita, Dhammapada, Tao Te Ching, Rumi, Jesus, Lao Tzu, Ramana Maharshi, Krishna, Course in Miracles, Nisargadatta Maharaj, Buddha, Thomas Merton and many others. With this passion for wisdom, I developed a greater understanding, awareness and respect for the human spirit and empathy for human life as well. I feel truly fortunate to have the platform of my life's work to express my passion for serving my clients and helping them be open to new mental models in the way they think about money, the sorrows of life as well as all areas of their lives. I enjoy helping them find peace in investing while diligently focusing on helping them in accomplishing their financial goals. In some cases, we focus on budgeting and learning how to live within their means while discerning between essential and non-essential spending. With this vision in mind, in September 2017 I had a book published by Koehler Publishing, "The Yoga of True Wealth", "Wisdom from a Heart on Wall Street". “The Yoga of True Wealth" Back Cover- Could it be that the essential missing asset class in the entire investment landscape is about to be enriched with a healthy allocation? That ingredient is nothing less than the human heart and the life changing power of faith and love. The Yoga of True Wealth is as enlightening as it is touching, a blessing to the financial world from one of its own. "Man is a captive on earth. His body and his mind are his prison bars. And the soul is unconsciously craving to experience once again the freedom that originally belonged to it." -Rumi --The Masnavi Aside from this, another recent development in my practice includes my attaining within Morgan Stanley the elite title and accreditation of “Family Wealth Director”. This training builds on my experience of working with Ultra high net worth clients and included going through a rigorous and intensive curriculum in the areas of Family Dynamics, Business Succession Planning, Philanthropy Management,, Intergenerational Planning and Wealth Transfer, Estate Planning, Insurance and Risk Management, Liability and Credit Management as well as Investment Management .By focusing on this program from Oct 2018 to June 19th 2019 and taking 8 exams at the end of each month followed by a two day written and oral exam in New York from June 16th to June 18th,  I am now one of 250 elite advisors in the firm (out of 16000) or less than 2%, who has gone through this challenging process. Having received the CFP designation 20 years ago, and finding this even more difficult, I often thought about a great quote from Hall of Fame major league baseball manager Earl Weaver that stated, “It’s what you learn after you think you know it all that counts”.  Another new development recently is my being named to the Board of Trustees of New Hope Integrated Behavioral Health Center <https://newhopeibhc.org/francis-bitterly-joins-new-hope-ibhc-board/>. This is truly a blessing to be able to support New Hope’s CEO Tony Comerford.  New Hope's culture and mission reflect my core values of giving back and serving others in need.  Finally, a recent focus during the pandemic was finishing an intense 6 month online interactive workshop taught by Dale Borglum of The Living /Dying project of San Francisco, California. I am now an adjunct volunteer. <https://www.livingdying.org/intro/>. Living/Dying Project Mission StatementThe Living/Dying Project offers conscious and compassionate support in the spirit of mutual exploration to those facing life-threatening illness, to their caregivers, to those facing life’s most difficult situations, and to anyone committed to spiritual transformation.Imagine facing deathwithout fear.Imagine usinga life-threateningillness as an opportunityfor spiritual awakening.Imagine approachingthe unknown withan open heart.We often resist changeas a natural part of life.Strength and healingcan be found in life’smost difficult situations.This training will help me continue to help my clients and others who are facing death.Thank you for your consideration. |