

PAUL STREBEL, CPA, CFP
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EDUCATIONAL EXPERIENCE

CORNELL UNIVERSITY 2003-Present
Lecturer

Currently:

- Lecturer at The Cornell School of Hotel Administration, three courses: “Financial Planning & Wealth Management”, “Financial Accounting Principles”, and “Personal Financial Management”.
- Cornell Center for Teaching Excellence: Completion of Cornell Teaching Certification Program – March 2012
- Cornell Faculty Fellow: Primary Responsibility is to provide students with opportunities to explore their academic, intellectual, and cultural interests.
- Academic Advisor: Cornell Division 1 Men’s Hockey Team
- College Admissions Committee, The Cornell School of Hotel Administration

ITHACA COLLEGE various

- Guest Lecturer on personal finance and entrepreneurship.

OTHER 2006-Present

- Provide Financial Literacy workshops to student and other organizations and with a focus on basic financial skills and the risks and benefits of business ownership.

PROFESSIONAL EXPERIENCE

THE STREBEL PLANNING GROUP, Ithaca, NY, 1986-Present
Founder and Partner – Created the financial and business consultancy firm, advising individuals and businesses to create outstanding businesses and financial security.

- Strebel and Strebel, CPAs: Created the full service public accounting firm serving businesses, not-for-profits, and individuals throughout the states of New York and New Jersey.
- Ultimate Results: Created a unique business coaching and consulting firm to help business owners take their business to a new level and to realize the full potential of the business and to create a more balanced and rewarding life for the business owner. This is accomplished through rigorous strategic planning, systems development and documentation, and organizational structure.
- New Horizon Financial Strategies: Created the Fee-only financial services firm that operates as a Registered Investment Advisory firm through New York State. We operate as financial fiduciaries in helping our clients through a holistic approach to planning that includes goal planning, risk management, retirement and estate planning as well as investment management.

PROFESSIONAL EXPERIENCE cont.

- ASSETMARK, Pleasant Hill, CA 1999-Present
Strategic Partner – Established and implemented formal strategic initiatives around investment management, advisory consulting and 401k retirement plans. Member of their Gold Team since 2007.
- MEMENTO MEMORIAL JEWELRY, Ithaca, NY 2010-Present
Founder, Partner and Chief Financial Officer – Co-founded the company around the design of unique, high-end, memorial jewelry.
- SYMBOL TECHNOLOGIES, INC., Bohemia, NY 1989-1992
Corporate Tax Manager – Performed tax planning and compliance for this multinational corporation.
- ARTHUR ANDERSEN & COMPANY, New York, NY 1986-1989
Financial Auditor and Tax Accountant – Served a variety of clients in many industries on both the audit and tax side of the business for this once prestigious public accounting firm.

PROFESSIONAL DESIGNATIONS

- Certified Public Accountant (CPA), New York, 1991
- Certified E-Myth Consultant (CEC), 1999
- Certified Financial Planner (CFP), 1985
- Registered Financial Consultant (RFC), 1990

VOLUNTEER WORK

- Board of Directors, Treasurer, Local First Ithaca (member of the Business Alliance for Local Living Economies - BALLE): 2010- 2014.
- Board of Directors, President, Ithaca Hours; 2010-2014. (local currency system)
- Board of Directors, United Way, Board President: 2014-2015.
- Board of Directors, United Way, Finance Committee Chair: 2009-2014.
- Board of Directors, United Way, Treasurer: 2015-2016.

MEMBERSHIPS

- American Institute of Certified Public Accounting
- Financial Planning Association
- International Association of Registered Financial Consultants

EDUCATION

- Adelphi University, School of Business Administration, New York
Bachelor of Business Administration in Accounting, May 1986
Honors: Graduated Magna Cum Laude
Vice President, Accounting Honor Society
National Honor Society in Business Administration
- Adelphi University, Institute of Financial Planning, New York
Certified Financial Planner, December 1985
- State University of New York at Delhi, School of Hotel Management
Associate in Applied Science, May 1978
- E-Myth Worldwide, E-Myth Consultant Certification Program, California
Certified E-Myth Consultant, May 1999