Contact

asherman@1847financial.com

office: (610) 771-1060

161 Washington Street, Suite 700
Conshohocken, PA 19428

1 N. Federal Highway, Suite 201
Boca Raton, FL 33432

Education

- B.A. Business Administration, Gettysburg College
- Series 6, 7, 26, 63, 65
- Certified Financial Planner® (CFP®)
- Chartered Financial Consultant® (ChFC®)
- Chartered Life Underwriter (CLU®)
- Master of Science in Financial Services (MSFS)

Industry Organizations

- Member, Greater Boca Raton Estate Planning Council
- Member, National Association of Insurance and Financial Advisors (NAIFA)
- Member, Financial Planning Association (FPA)
- Member, Association of Advanced Life Underwriters (AALU)
- Member, Philadelphia Council for Business Economics (PCBE)
- Former Board Member, Society of Financial Service Professionals (Philadelphia Chapter)
- Former Director, Philadelphia Estate Planning Council

1847 Private Client Group

Adam T. Sherman, CFP®, ChFC®, CLU®, MSFS

FOUNDING PARTNER

AN ACCOMPLISHED INDUSTRY LEADER DEDICATED TO BUILDING AND PROTECTING CLIENT ASSETS

Adam Sherman has built his career on his expertise in all aspects of wealth management, with a focus on estate planning strategies and asset management. He joined 1847Financial in 2016 as Senior Partner, bringing over 30 years of experience working with closely held family businesses, executives and families of significant wealth. His alignment with 1847Financial further strengthened the firms' commitment to become an eminent financial services firm within the high net worth marketplace.

Prior to joining 1847Financial, Adam was co-founder and CEO (2006 – 2016) of Firstrust Financial Resources (FFR) in Philadelphia, PA, and also served as president of Firstrust Financial Advisors (FFA), the firm's Registered Investment Advisor (RIA). As a founder of Progress Financial Resources (PFR), FFR's predecessor, he is recognized as an innovator of the integration of banking and wealth management throughout the country. Preceding he and his partner's re-acquiring PFR from Bank of America, PFR was one of the first companies to recognize how to capture synergies with banks, post Gramm-Leach-Bliley.

Adam is actively involved in the community, where he lends support in many ways. He is currently a board member of the Kaiserman JCC after serving as Board President from 2004-2006. He also serves as board member of Philadelphia Youth Basketball (PYB) and is currently a director of PVJSA which is the largest youth sports organization in Lower Merion.

Adam and his wife, Michele, reside in Penn Valley, PA, and Boca Raton, FL with their three children.

Media and Publications

Adam is a highly sought after speaker and commentator in the financial services industry and has appeared on the following programs:

- NBC 10 "All That and More" with Tracy Davidson
- Bloomburg News
- CNBC's "Power Lunch"
- Fox Business News

In addition, Adam was recognized by Forbes as one of the Top Financial Securities Professionals of 2021, and has been quoted in many prominent publications and news outlets, including:

- The New York Times
- Wall Street Journal
- Chicago Tribune
- Pittsburgh Gazette
- National Underwriter
- MoneyNews.com
- Forbes.com
- CNBC.com
- Washington Post
- Bloomberg News
- St. Louis Post Dispatch
- Philadelphia Daily News
- Financial Planning Magazine
- Philadelphia Magazine