

Ten years ago, after spending two years as a financial advisor for Prudential Financial Services, W. Burk Rosenthal began an independent investment advisory firm as a sole practitioner. Today, Rosenthal Retirement Planning is quite successful.

It employs 24, including five financial advisors, and has offices in three cities. The firm handles more than 1,000 client accounts, totaling more than \$250 million in client assets. Burk Rosenthal is just 38

years old, and his company ranks in the top five percent of financial advisors nationwide. Not bad!

Burk is busy elsewhere as well, volunteering his time and contributing to the American Heart Association, the American Cancer Society, Kids Who Care, the Salvation Army and Fort Worth

Women's Haven.

Rosenthal is the husband of Julie Rosenthal, an attorney and financial advisor, who owns and manages the business along with her husband. Burk is also the proud father of four-year-old twin daughters. At the moment, he's involved in teaching them to ride their bicycles and to improve their swimming skills.

Burk says he enjoys rebuilding classic Mustangs; his current project is a 1965 Mustang convertible. He's just kind of an all-around guy, according to friends, who also say he has a great sense of humor and that he loves to watch *Batman* with his daughters.

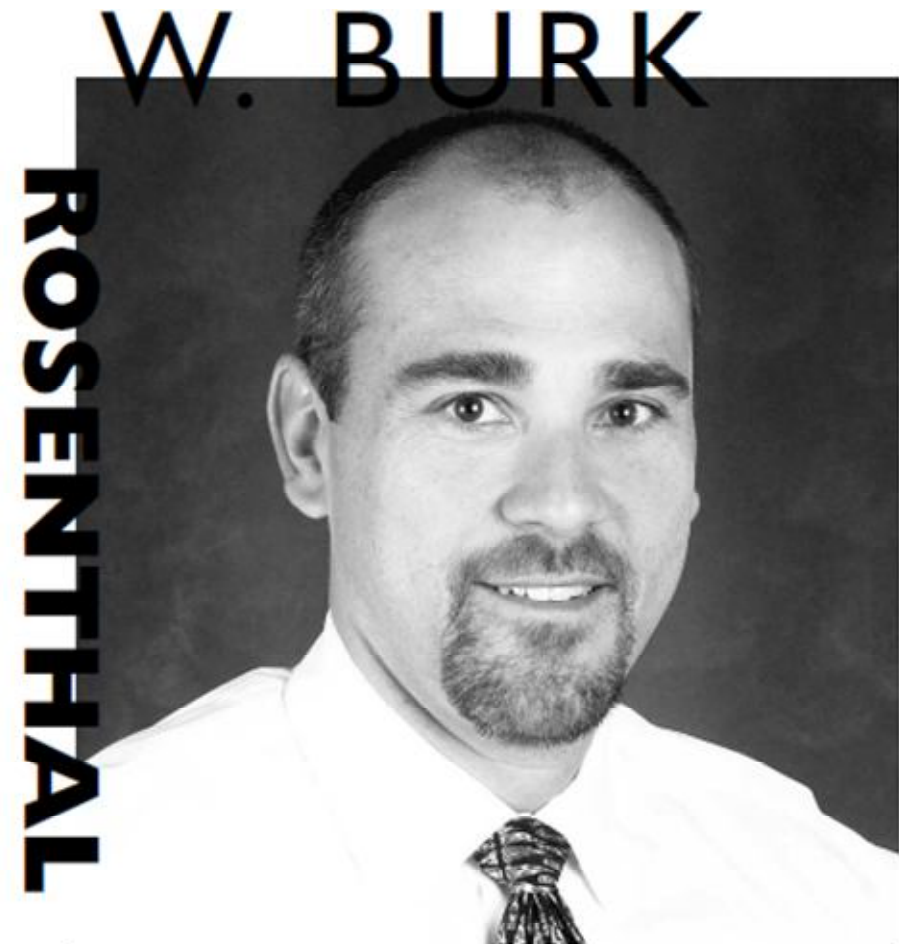
"I get a kick out of watching *Batman* with the girls because they enjoy it so much," Burk says. "But that's just one of the many pleasures of being a father."

Burk says that he also enjoys old time radio shows when he has time to catch them. And he likes to dabble in magic. Poof! He's a success.

Name: W. Burk Rosenthal

Age: 38

Occupation: Founder,
Rosenthal Retirement
Planning



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Securities and Advisory Services offered through National Planning Corporation (NPC), Member FINRA/SIPC, a Registered Investment Advisor.

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