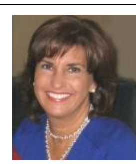
The Lubitz Financial Group
PERSONAL FINANCIAL PLANNING & INVESTMENT MANAGEMENT

Our Team

Our goal at the Lubitz Financial Group is to serve you in the best way possible. Our objective is to help you feel comfortable and pleased with our services by responding to inquiries as quickly and thoroughly as we can. To better connect with the professional who can best respond to your questions, please refer to the following list of resources.

We can be reached at **305.670.4440. Our fax number is 305.670.4448.** Whenever possible, we will speak with you directly. If you prefer email, our email addresses are listed. And we love when our clients stop by our office!

The help you need		Contact
For detailed questions regarding your portfolio, portfolio management, performance report, specific securities or trades, and tax issues.		**Linda Lubitz Boone, CFP®** President Ext. 860 LindaL@LubitzFinancial.com
For questions about a financial plan that is currently in process or updated, e.g., insurance needs, estate planning, retirement planning, mortgage and cash flow planning questions		**Jorge Padilla, CFP®** Senior Client Advisor Ext. 853 JorgeP@LubitzFinancial.com
For questions regarding any aspects of financial planning, retirement, trust and estate planning, education, insurance needs, family wealth planning meetings, educational programs or life changing events		**Philip Herzberg, CFP®, CTFA, AEP, MSF** Client Advisor Ext. 863 PhilipH@LubitzFinancial.com
Deborah will be working closely with the advisory team in all matters related to your financial plan, portfolio management, and supporting the development of our in-depth planning expertise.		**Deborah Badillo, MMP, MS** Associate Client Advisor Ext. 852 DeborahB@Lubitzfinancial.com
For questions about account applications, title changes, address changes, deposits, withdrawals, IRA and trust distributions or other cash needs. Madeline can also help you with questions you have about your custodian (i.e. Schwab, Fidelity, etc). Contact Madeline for scheduling, changing or confirming appointments.		**Madeline Jusino** Client Services Associate Ext. 854 MadelineJ@LubitzFinancial.com
For questions or comments about our office, office procedures, your contracts or compliance matters, please contact Nancy. If you would like more information about our services or would like us to share this information with a friend, please let Nancy know.		**Nancy Marie Mele** Business Operations Manager Ext. 851 NancyM@LubitzFinancial.com
For questions or comments about our office, internal operations or general inquiries, Nercys can also help you. She works with our Business Operations Manager and supports our office staff.		**Nercys Rijssenbeek** Administrative Assistant Ext. 855 NercysR@LubitzFinancial.com