



BERT WHITEHEAD

FACTS

Facts About Bert Whitehead, MBA, JD

- Founder of the Alliance of Cambridge Advisors (ACA), a not-for-profit organization that trains financial advisors on the Cambridge approach to holistic fee-only financial planning. The ACA currently has over 100 trained advisors in 27 states in the United States. All advisors trained by Bert Whitehead maintain the highest levels of credentials (e.g., JD, CPA, CFP) and ethical standards.
- Founder of the Cambridge Connection in 1983. Bert and his staff provide their specially designed fee-only tax and financial services to more than 150 clients out of six U.S. locations, including Michigan, Arizona, and Florida.
- Annual recognition as one of the “Top Financial Advisors” in the country by major media outlets, including *Worth* magazine, *Mutual Funds* magazine, and many others.
- Author of *Facing Financial Dysfunction: Why Smart People Do Stupid Things with Money* (2nd ed.). The book describes Bert’s unique approach to achieve financial freedom using Functional Asset Allocation. An accompanying workbook, currently in the pilot stage and being tested in workshops across the country, will soon be available to the public.
- Pioneer member of the National Association of Personal Financial Advisors (NAPFA).
- Creator of the Family Financial Retreat, an annual event that takes place in Las Vegas, Nevada. Entire families come together to learn about money and financial management.
- Education: BA (psychology), University of Arizona, 1965; MBA (finance), University of Arizona, 1967; JD, Detroit College of Law, 1969.