Biography

U.S. TRUST

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Robert Goodman is a Senior Vice President and Wealth Strategist at U.S. Trust, Bank of America Private Wealth Management. In this role, Robert works with our affluent clients to develop comprehensive wealth management plans to help them meet their financial goals and objectives. Prior to joining U.S. Trust in 2005, Robert spent twenty-one years in public accounting, including seven years as the Tax Director for a large local Phoenix, Arizona CPAfirm specializing in financial, compensation and retirement counseling.

Robert received his Bachelor of Science in Business Administration from the University of Nebraska-Lincoln and his Masters in Taxation from Arizona State University. He is an ACCREDITED ESTATE PLANNER ™ and sits on the board of the National Association of Estate Planners and Councils. Robert teaches Graduate and Undergraduate courses in income tax as an adjunct professor. He is also a member of other organizations such as the American Institute of Certified Public Accountants and Central Arizona Estate Planning Council. He is a CERTIFIED FINANCIAL PLANNER™.