

# EDWARD J. BARRETT

CFP®, ChFC®, CLU®, CEBS®, RPA®, CRPS®, CRPC®, CPFA

## Founder, President and CEO

Edward J. Barrett CFP®, CHFC®, CLU®, CEBS®, RPA, CRPS®, CRPC®, CPFA is the Founder, President and CEO of The Barrett Companies and Broker Educational Sales & Training, Inc. (BEST). He has over 40 years of experience in the financial and insurance services industries, is the principal author of a series of professional continuing education courses and has presented to roughly 200,000 financial and insurance professionals nationwide.

### Professional Experience

- 1986 - Formed the Barrett Companies and BEST
- 1984 - Merrill Lynch:
  - Account Executive
  - Estate and Business Insurance Specialist for the New England region
- 1974 - Investors Diversified Services (IDS):
  - Registered Representative
  - Top District Sales Manager

### Education

- Bachelor of Science Degree in Economics and Political Science
- Certified Financial Planner (CFP®)
- Chartered Financial Consultant (ChFC®)
- Chartered Life Underwriter (CLU®)
- Certified Employee Benefit Specialist (CEBS®)
- Retirement Plans Associate (RPA)
- Chartered Retirement Plans Specialist<sup>SM</sup> (CRPS®)
- Chartered Retirement Planning Counselor<sup>SM</sup> (CRPC®)
- Certified Plan Fiduciary Advisor (CPFA)

### CONTACT INFORMATION

Corporate Address: 7137 Congress Street, New Port Richey, FL 34653

Corporate Website: [www.brokered.net](http://www.brokered.net)

Book Ed for an Event: [www.brokered.net/speaker-trainer.html](http://www.brokered.net/speaker-trainer.html)



Contact Ed at:

1.800.345.5669

[AskEd@brokered.net](mailto:AskEd@brokered.net)

# TESTIMONIALS

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*“Mr. Barrett is an outstanding speaker and highly knowledgeable professional.”*  
~ Morgan Stanley Advisor

*“Ed is the best I’ve ever seen in 22 years in the business!”*  
~ Merrill Advisor

*“I would recommend having Mr. Barrett return to teach this course every year.”*  
~ Raymond James Advisor

*“Ed is a knowledge of wealth to be shared.”* ~ Transamerica Advisor

*“Ed explains things better than anyone I have ever heard! Very clear and concise.”*  
~ UBS Advisor

*“Ed is an outstanding presenter.”* ~ Pacific Life Advisor

*“Ed, great job as always!”* ~ John Hancock Advisor

*“I love ED! He’s the BEST!”* ~ Allianz Life Advisor

*“Ed was very knowledgeable and entertaining to watch. I learned a lot. Thank you.”*  
~ Brighthouse Financial Advisor

*“Presentations are always well done, informative and timely. A must for FA’s to attend for CE credits.”* ~ Columbia Threadneedle Investments Advisor