

## Brian M. Seelinger

### Counsel

Brian has spent his career solving complex financial challenges. He is compassionate while maintaining a process-oriented methodology. Examining a situation from multiple angles while being able to communicate across business roles is one of his strengths. His breadth of experience across roles and industries provides clients a 360 degree view of situations, often providing unique but simple solutions while also able to engage in the most complex financial situations.

Brian was most recently a Senior Portfolio Manager and Vice President in the Trust Department of a publicly traded multi-state bank. While there he worked with institutional and personal clients, including municipal governments, pensions, non-profits, guardianships, foundations, endowments, authorities, trusts, small businesses, and high net worth clients. Beyond investment management he also performed a variety of fiduciary and compliance tasks regarding ERISA, mutual fund selection, financial modeling, risk management, financial projections, and tax planning,

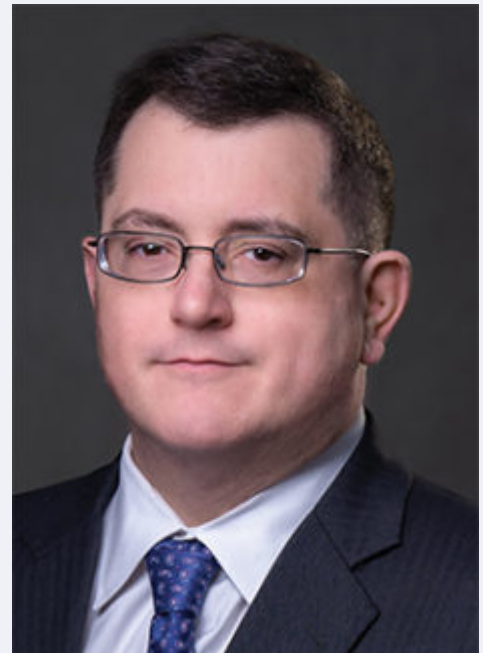
He also has experience as an entrepreneur at a regional technology firm, growing it to over \$40 million in sales and managing more than 30 employees. He has negotiated more than \$200 million in contracts, and has lead multi-year projects involving technical, finance, accounting, and operating staff as the liaison able to speak the “language” of each area. Brian knows the stress of running a growing business and making a payroll.

### Practice Areas

- [Business & Tax](#)
- [Employee Benefits](#)
- [Public Finance & Bonds](#)

### Education

- Syracuse University College of Law, J.D.
- Pennsylvania State University, M.B.A.
- Pennsylvania State University, B.S. in Finance



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# Admissions and Certifications

## Admissions

- Pennsylvania
- Ohio
- U.S. District Court for the Western District of Pennsylvania
- U.S. Tax Court

## Certifications

- Chartered Financial Analyst (CFA®)
- Certified Public Accountant (CPA)
- Financial Risk Manager (FRM®)
- Chartered Alternative Investment Analyst (CAIA®)
- Certified Securities Compliance Professional (CSCP®)
- Certified Financial Planner (CFP®)
- Chartered Life Underwriter (CLU®)
- Professional Risk Manager (PRM®)
- Retirement Income Certified Professional (RICP®)

## Representative Experience

### Business Purchase (Buyer):

- Developed buy-out plan leveraging existing assets to reduce loan expense
- Compiled pro-forma financial statements
- Found increased efficiencies in existing processes and contracts
- Suggested protective covenants to secure buyer's financial interest

### Non-Profit Trust:

- Prepared necessary filings to invade permanent maintenance fund for necessary and extraordinary capital expenditure

## Community and Professional Service

### Community and Professional Service

- Erie Maritime Foundation, *Board Member*
- CFA Financial Literacy Program for K-12, *Volunteer*
- Penn State University, *Adjunct Lecturer, Finance*
- Boy Scouts of America, *Leader and Eagle Scout*

### Professional Affiliations

- Erie County Bar Association
- Pennsylvania Bar Association
- CFA Society, Pittsburgh and Cleveland Chapters

- Chartered Alternative Investment Analyst Association Virtual Chapter
- Global Association of Risk Professionals
- American Numismatic Association
- Federalist Society
- MENSA

## **Presentations**

### **Speaking Engagements**

- Pennsylvania State Association of Township Supervisors (PSATS) Regional Forum, "Act 44's Impact on Investing", August 2024
- Firm's Municipal Law Symposium, 2024: Municipal Law Roundtable Panelist
- Scouting University 2024: Taught Personal Management Merit Badge course
- Plan Sponsor's National Conference Session "In-Plan Guaranteed Income" Panelist, June 2021
- Crossroads Foundation Pittsburgh: Presented on financial literacy for first generation college students
- CFA Society of Pittsburgh Act 48 Seminar: Presented financial literacy fundamentals for teachers