



Juan C. Ros, CFP®, AEP®, CSPG, CEPA, CVGA®

Juan Ros, CFP®, CSPG, AEP®, CEPA, CVGA® is a Financial Advisor for Forum Financial Management, LP. Most recently, Juan was a partner and vice president at Lamia Financial Group, Inc., which joined with Forum in January 2019. Prior to joining Lamia, Juan held various gift planning and major gift positions at the Ronald Reagan Presidential Foundation, Occidental College and the ALS Association, helping to raise millions of dollars in current and deferred gifts.

Juan works closely with legacy-minded families and business owners to enhance, protect and help transfer their wealth, particularly when charitable planning is involved. Since 2015, Juan has served on the faculty of the American Institute for Philanthropic Studies, which awards the CSPG designation. He is a frequent contributor and member of the editorial board for the monthly publication *Planned Giving Today*.

Juan serves on the boards of the Conejo Valley Estate Planning Council and the nonprofit Fit 4 the Cause. He is an active member of ProVisors, the Financial Planning Association, the Exit Planning Institute and past president and a member of the Los Angeles Council of Charitable Gift Planners. Juan is also the founder of Financially Zen, a provider of personal finance content delivered online and through social media channels.

Juan is a CERTIFIED FINANCIAL PLANNER™ professional. He holds the Certified Specialist in Planned Giving designation, the Accredited Estate Planner® designation, the Certified Exit Planning Advisor designation and the Certified Value Growth Advisor® designation. Juan earned his MBA with an emphasis in Financial Planning from California Lutheran University in Thousand Oaks, California. He holds a Bachelor's degree from The Pennsylvania State University in State College, Pennsylvania.

Prior to his work in wealth management and philanthropy, Juan worked in the film industry. His name can be seen in the credits of numerous films including "Cape Fear," "JFK" and "The Godfather Part III." Juan resides in Ventura County, California, with his wife, two sons and dog, Sasha.

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