

Tony Novak

WORK EXPERIENCE

- **Accountant/adviser**, 1987-current
 - Formerly operated as a Registered Investment Adviser, SEC and NJ (withdrawn)
 - Now CPA offering online accounting and bookkeeping services for small businesses
 - QuickBooks Online Certified ProAdvisor
 - Clients include two non-profit industry associations
 - Clients include the family businesses of two public company executives
 - Wrote and recorded CPE programs for National Seminars Training, Rockhurst University
 - Taught personal financial planning at Delaware Valley University evening school division
 - Instructor for a professional continuing education course called "*Current Events in Employee Benefits*" offered to accountants, attorneys and financial planners
 - Many articles, public presentations on issues related to small business management.
 - Founded and sold MedSave.com, a first generation insurance exchange
 - Operating under trademarks "Freedom Benefits" and "OnlineNavigator" and pending trademark "OnlineAdviser"
- **Auditor** with Pennsylvania Public Utility Commission, 2013-2014
 - Audited PECO Energy and First Energy electric and gas rates in Southeastern PA to meet experience requirements of Delaware State Board of Accountancy
 - Promoted from Auditor Trainee to Auditor 1 after one year of service
- **General Agent** for Fortis Financial Group, Narberth PA, 1987-2003
 - Managed a sales office that recruited and trained more than 20 agents and produced more than a million dollars per year revenue in the years preceding the company's U.S. distribution system reorganization.
 - Recognized as the nation's top online producer on supplemental non-insurance health benefits
 - Recognized for company-leading client retention
- **Account Executive** with Drexel Burnham Lambert in Jenkintown, Pennsylvania, 1986-1987
- **Pension Accountant** with Pension Plan Services Inc. in Philadelphia, Pennsylvania, 1985-1986

EDUCATION

- **Masters in Taxation**, Villanova Law School, 1995, focus in compensation planning
- **Master in Business Administration**, Temple University, 1985, focus in finance & accounting
- **Bachelor of Science Degree** from Delaware Valley College, 1982
- Methacton High School, Fairview Village, PA 1978

LICENSES AND REGISTRATIONS

- Certified Public Accountant, State of Delaware, #CC-0003632, February 2014
- Licensed life, accident & health insurance producer in all 50 states and DC, NAIC #2048780
- NASD license series 3, 6, 7, 15, 22, 26, 65
- QuickBooks ProAdvisor, FreshBooks Certified Accountant

CONTACT INFORMATION

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