



## **Roger A. Feldman, CPFA<sup>®</sup>, CEPA<sup>®</sup>**

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Roger A. Feldman is a Certified Plan Fiduciary Advisor (CPFA<sup>®</sup>) and Certified Exit Planning Advisor (CEPA<sup>®</sup>) with the Anchor Wealth Management Team at UBS Financial Services in Baltimore, Maryland. Throughout most of his career, Roger devoted his energy to the institutional side of the retirement plan ecosystem, building deep expertise and insight into the unique challenges and opportunities organizations face. Transitioning into wealth management was a natural evolution—one that brings together the full spectrum of Roger's professional experience and passion for helping others achieve their financial goals. With his diverse background, Roger guides his clients through complex financial decisions, combining strategic planning with a personalized approach. Roger's commitment to excellence and education has positioned him as a trusted resource for both individuals and organizations. Roger and his team are excited to share insights and best practices to empower others at every stage of their financial journey.