

MEDIA RECOGNITION

“Dedicated client service and getting to know them at a deeply personal level has resulted in a steady stream of referrals that keep Altfest Personal Wealth Management growing.”

Investment News, 2015

“Dreamer. Pioneer. Game changer. Lew Altfest, widely credited with changing financial planning for the better, is all those things.”

Research Magazine, 2014

Total Portfolio Management...blends analytical and personalized assessment to create customized client portfolios.

Think Advisor, 2014

Lew and Karen Altfest received “Financial Planning’s Lifetime Achievement Influencer Award for their shared roles in both spreading the gospel of objective, fee-only financial planning in the consumer marketplace, and for reaching out to women on personal financial issues.”

Financial Planning, 2013

Karen Altfest is “a highly ranked and regarded financial advisor.”

The Wall Street Journal, 2012

“Well respected for his value approach to investing, [Lew] Altfest is constantly scouring the globe for bargains.”

Medscape, 2012

Lew Altfest is one of the “financial planning profession’s most respected veterans.”

Money, 2009

Karen Altfest is “One of the most prominent female wealth managers in the business.”

Wealth Manager, 2008

“In this world of growing uncertainty, it can be reassuring to turn to a seasoned professional for advice and guidance. One of the country’s top financial planners is Lewis Altfest.”

PBS’ WealthTrack, 2006

If God needed a financial planner, “God would hire Lewis Altfest.”

Gannett News Services, 2006

“Lew Altfest is one of the best at poking holes in all of the foolish, misguided, and overly complex investment ideas people too often think are the solutions to their financial problems.”

Kiplinger’s, 1992