

Professional Credentials: Robert Farmer, CEA, MFP™



Robert Farmer is President and CEO of CWM Real Estate & Management Services in Burbank, CA. He is a Certified Estate Advisor and Master Financial Professional™ who has been providing real estate investment analysis services to clients since 1987. Before starting CWM Real Estate & Management Services, he served as a real estate professional assisting clients with a wide range of services including multi-family residential, commercial, industrial, and office sales, leasing and development.

Education and Certifications

Bachelor of Science, Business Administration, the University of Southern California
Certified Estate Advisor, National Association of Financial and Estate Planning
Master Financial Professional,™ American Academy of Financial Management

Professional Licensing

California Bureau of Real Estate Broker's License # 00962626

Specialized Fiduciary and Investment Training

National Association of Financial and Estate Planning, Los Angeles, CA
Cannon Financial Institute, Boston University, Boston, MA
MassMutual, Estate and Business Succession Planning, Los Angeles, CA
College for Financial Planning, Estate Planning for Qualified Plans and IRAs

Recognition and Awards

2013-2017 Los Angeles Magazine Five-Star Wealth Manager*
International Who's Who of Professionals
Who's Who in Financial Planning



*Award based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Wealth managers do not pay a fee to be considered or placed on the final list of 2013-2017 Five Star Wealth Managers.

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Community Involvement *(past and current)*

President, San Fernando Valley Estate Planning Council
Trustee, Pasadena Historical Museum
National Association of Realtors
Glendale Board of Realtors
Chairman, Los Angeles Trust and Tax Forum
Board Member, Leave-A-Legacy, Planned Giving Round Table of Southern California
Member, Los Angeles Estate Planning Council
Member, Western Pension and Benefits Conference
San Fernando Valley Estate Planning Council
Insured Retirement Institute

Other Information and Recognition *(past and current)*

Trust, Investment, and Estate Planning Speaker
All-American Team, American Funds Group
Continuing Education Sponsor:
 Certified Financial Planner[®] Board of Standards, Inc.
 Certified Public Accountants
 California Department of Insurance Sponsor #112884
Instructor, Glendale College, Adult Education
Real Estate Educator, California Community Colleges, Real Estate Education Center

Contact Information

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