



CELEBRATE LA ROCHE!



James J. Holtzman '96

*Personal Chief Financial Officer and Shareholder
Legend Financial Advisors Inc. ®*

An internship during James Holtzman's sophomore year at La Roche College led to a long-term relationship with his current employer, Legend Financial Advisors Inc.®

Mr. Holtzman, who now works as the firm's personal chief financial officer and shareholder, is responsible for meeting with clients, researching client issues, and preparing and presenting financial planning cases and updates. He also is a member of the financial planning, investment management, advanced technology and education committees, and serves as the firm's income tax and education funding and planning specialist.

Former Accounting Professor Bernie Michalek introduced Mr. Holtzman to the owner of Legend Financial Advisors Inc. when he was still a student. The introduction resulted in an internship and a relationship that evolved until Mr. Holtzman joined the firm as a full-time employee in May of 2001.

"La Roche made a difference in my life by having professors that not only taught the course material but also provided me with real-world and practical experience. I was fortunate to develop personal relationships with professors who also were mentors," Mr. Holtzman said.

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