



**Matt McGrath, CFP®**  
*Managing Partner*

Mr. McGrath is the Managing Partner and a Principal of Evensky & Katz. He originally joined the firm as Director of Planning. He currently heads one of the firm's planning teams, working directly with individuals and institutions - addressing their wealth management and financial planning needs. He is Chair of the firm's Planning Committee and a member of the firm's Investment Committee.

Mr. McGrath is an original member of the Board of Directors of the Financial Planning Association of Florida and currently serves as Chairman. He is also a founding member of the Board of Directors of the Financial Planning Association of Miami-Dade and served as President for two years. He has also served as Treasurer of the Gold Coast chapter of the American Association of Individual Investors (AAII).

Mr. McGrath has the distinction of being one of the first to earn his MBA in Personal Financial Planning from the University of Miami after earning his BA in Economics, also from the University of Miami. He is a CERTIFIED FINANCIAL PLANNER™ practitioner and has also earned the designation of Chartered Retirement Planning Counselor granted by the College for Financial Planning.

Mr. McGrath is a recurring guest commentator on South Florida's CBS affiliate, CBS4, as part of the station's 4 Your Money Team. He is regularly quoted in both local and national media, including *The Wall Street Journal*, *The Miami Herald*, *Sun-Sentinel.com*, *Miami Today*, *The New York Post*, *CNNmoney.com*, *Bankrate.com*, *InvestmentNews*, *TheStreet.com*, *The Washington Times*, *Kiplinger.com*, *AARP The Magazine*, *CNBC.com*, and *MSN Money Central*. He has also been published in the *Journal of Retirement Planning*, *Financial Planning* and *Small Firm Business*.