



Barbara B. Markell, CFP®

Account Executive

John G. Ullman & Associates, Inc.

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Barbara brings to her clients a depth of knowledge of the financial world. She takes the time to build relationships, valuing the opportunity to work closely with her clients. Her approachable style allows her clients to comfortably work through even the most complex issues.

Credentials

- Syracuse University, Maxwell School Masters of Public Administration
- Queens College, CUNY, BS
- Certified Financial Planning®
Certificant

Community Service

- Barbara is involved in numerous community organizations including Rhinebeck Rotary Club and the local chapter of the Financial Planning Association.
- Member of Rhinebeck Chamber of Commerce

Background

When Barbara led the NYS Assembly Speaker's staff in investigating financial issues, she insisted on thorough, rigorous research. Her depth of understanding about banking, insurance and other financial issues enabled her to make important policy decisions. As a high school history teacher, she delighted in making complex topics understandable to her students.

Barbara knows how difficult life transitions can be and has experience with people going through such life changes as divorce, new jobs, long term care needs. Barbara brings to JGUA sensitivity and knowledge to life changing moments and the same enthusiasm and attention to detail as she would her own.

Areas of Expertise

- Retirement Planning
- Survivorship Analysis
- Insurance Analysis
- Estate Planning
- Education Planning

