EAST RIVER
PRIVATE CLIENT GROUP

Our Mission:

We advise driven visionaries on how to achieve freedom in life and create long-lasting legacies.

Who We Are

Located at the flagship Chrysler East office in New York City, the East River Private Client Group helps high-net-worth individuals and multiple generations of families who need thoughtful consideration and careful planning to help them reach their financial goals. We offer customized strategies and financial planning services – including design, implementation, and management.

Our clients receive a roadmap, tailored advice, as well as the necessary tools to achieve their specific goals:

- **Retirement Planning** – reviewing, setting up and managing Traditional, Rollover, ROTH, SEP and SIMPLE IRA accounts, as well as 401(k), 403(b), Profit Sharing and Defined Benefit Plans
- **Stock Options** – advising on timing and how to exercise options tax-efficiently, as well as structuring hedging and income strategies
- **Liquidity** – ensuring proper cash flow management for personal and business needs
- **Investments** – creating and managing custom portfolios that include stocks, bonds, mutual funds, ETFs, hedge funds and private equity deals
- **Insurance** – reviewing and recommending coverage for life, health, disability, long-term care and buy-sell agreements
- **Education** – advising and setting up 529 plans, UTMA accounts, gifting strategies and student loans
- **Tax Planning** – creating and managing tax-efficient investment strategies and working with your accountants to reduce your tax liability
- **Estate Planning** – strategizing on wills, trusts and other advanced planning strategies and collaborating with your attorney on execution
- **Philanthropy** – facilitating and advising on charitable giving strategies and the creation of private foundations

Collaboration is Key

We provide investment advisory and wealth management to a broad range of individuals, families, and businesses.

A major strength is the team's ability to collaborate with clients' other professional advisors, such as tax and legal advisors and multi-family offices. In collaborating with these other professionals, they work to create a coordinated effort designed to help clients reach their financial goals.

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Our Team

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Petar Arizanov is an Executive Director – Investments at Oppenheimer's Chrysler East office, where he serves as a Financial Advisor to a select number of clients. He is a Portfolio Manager under the OMEGA Portfolio Management Program, which offers a managed money program in which experienced Financial Advisors act as portfolio managers for their clients.

He works with each client to design, recommend and implement customized investment strategies intended to help them work towards achieving their specific retirement, liquidity, investment, tax, education, estate and philanthropic needs.

Awards & Recognitions

2021: Best In State Wealth Advisor
2019: Top 1000 Next Generation Awards
2018: Top 500 Next Generation Wealth Advisors

**The ranking is based on an algorithm of qualitative and quantitative data for rating thousands of individuals on revenue produced, assets under management, compliance records, and industry experience. Oppenheimer & Co. Inc. is not affiliated with Forbes or R.J. Shook Research.*

Paul Fern

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Paul Fern is an Associate Director – Investments in the Chrysler East branch in New York City. Paul works closely with high-net-worth individuals, families, and small-to-mid sized businesses to navigate the complexities of wealth. He communicates directly with CPAs, estate attorneys, business brokers, trust officers, and other niche professionals to address client needs.

Paul's passion for the financial services industry derives from his desire to help others and educate professionals in financial literacy. He prides himself in his commitment to providing a world-class experience for each client, which includes a comprehensive approach to private wealth management.

Elena Shevchenko

Group Business Associate
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Elena Shevchenko is a Group Business Associate in the East River Private Client Group at New York City's flagship, Chrysler East office. She is a seasoned business professional with over 15 years of business development experience in diverse sectors. Elena leverages strong communication skills to foster long-lasting client relationships.

Elena handles the organization of team's events and networking opportunities including the ones held by Oppenheimer & Co. Inc. She believes strongly in the team's mission and has a passion for bringing awareness of the need for essential financial planning to individuals and businesses.