OPPENHEIMER

EAST RIVER
PRIVATE CLIENT GROUP

Our Mission:

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

Awards & Recognitions

East River Private Client Group
2025
Best-In-State Wealth Management Team

Petar Arizanov
2021
Best In State Wealth Advisor
Forbes Shook Research

2018
Top 500 Next Generation Wealth Advisors Forbes Shook Research

2019
Top 1000 Next Generation Awards
Forbes Shook Research

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.

Awards and rankings criteria at www.oppenheimer.com/legal/award-criteria.aspx

The Omega Group is a program through Oppenheimer & Co. Inc. It offers a managed money program in which experienced Financial Advisors act as portfolio managers for their clients. Adopting a fee based account program may not be suitable for all investors; anticipated commission costs should be compared with anticipated annual fees. Investing in securities is speculative and entails risk, including potential loss of principal.

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, CFP®

Executive Director – Investments | Portfolio Manager, Omega Portfolio Management

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.

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Paul Fern

Director – Investments

Paul Fern is a 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.

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Elena Shevchenko

Group Business Associate

Elena Shevchenko is a Group Business Associate in the East River Private Client Group at Oppenheimer's Chrysler East office in New York City. With over 15 years of business development experience, she focuses on strategic relationship management and expanding the team's high-net-worth client base. Elena builds partnerships that enhance access to wealth-planning resources and leads client engagement initiatives, including investment-focused events. Known for her precision and organization, she connects complex financial strategies to clients' personal goals.

She holds FINRA Series 7 and 66 registrations and ensures a seamless client experience from introduction to portfolio review.

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James Cao

Financial Advisor

James Cao is a Financial Advisor in Oppenheimer's Chrysler East office in New York City. He creates tailored financial plans and investment strategies for high-net-worth individuals, families, and small-to-midsized businesses, focusing on transparency, long-term relationships, and helping clients achieve goals through asset growth, wealth preservation, and legacy planning.

James graduated magna cum laude with a B.S. in Finance from Indiana University's Kelley School of Business. Before joining Oppenheimer, he was a Summer Analyst at Goldman Sachs, specializing in portfolio construction and tax-efficient strategies. He holds Series 7 and 66 licenses and enjoys time with family, friends, and following the Indianapolis Colts.

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Timothy King

Client Service Associate

Tim King is a Client Service Associate in the East River Private Client Group at Oppenheimer's Chrysler East office in New York. He provides client service and administrative account support, ensuring requests and transactions are completed accurately and efficiently. Tim serves as a reliable point of contact for clients, helping to coordinate day-to-day account needs with professionalism and attention to detail.

He values building strong working relationships and takes pride in delivering a high level of service in collaboration with the team. Tim is focused on growing within his role and supporting clients as they partner with their advisors to pursue their long-term objectives.