

# ROBERT H. PETROCELLI, JR. NAMED TO FORBES' TOP FINANCIAL SECURITY PROFESSIONALS BEST-IN-STATE LIST 2023

SUNRISE, FL, USA, August 10, 2023 /EINPresswire.com/ -- Robert Petrocelli from the South Florida General Office of New York Life has been listed on the 2023 Forbes Top Financial Security Professionals Best-in-State list. The individuals named to this list of distinguished professionals were chosen based on many criteria considered by an independent research firm.



New York Life has known for quite sometime what a valuable asset Robert has been to our family and to many families and businesses in our community."

*Rob Recine*

A New York Life agent for over 44 years, Mr. Petrocelli received this recognition for helping his clients in a world in which wealth preservation and protection matter more than ever.

"We are honored that Bob appears on this prestigious list," said Rob Recine, managing partner of the South Florida General Office. "New York Life has known for quite sometime what a valuable asset Robert has been to our family and to many families and businesses in our

community."

Robert Petrocelli is the Managing Director of [Petrocelli Financial Services](#) and has a degree from the University of South Carolina. Some of the core areas he helps his clients with include comprehensive benefits management, business continuation planning, estate and legacy planning, charitable planning, retirement planning, wealth strategies, and deferred compensation. His experience and ongoing education have provided him with great expertise in all areas of estate planning, employee benefits design and management, and related services. He and his family are residents of Naples, Florida.

Data provided by [SHOOK®Research](#), LLC. Data as of 12/31/22.

Source: [Forbes.com](#) (July, 2023).

Neither SHOOK nor Forbes receives any compensation in exchange for placement on its Top Financial Security Professional (FSP) rankings (including the Best-In-State Financial Security Professional rankings), which are determined independently (see methodology). FSP refers to

professionals who are properly licensed to sell life insurance and annuities. FSPs may also hold other credentials and licenses which would allow them to offer investments and securities products through those licenses. Ranking algorithm is based on qualitative measures learned through telephone, virtual, and in-person interviews to measure best practices, client retention, industry experience, credentials, review of compliance records, firm nominations; and quantitative criteria, such as assets under management, sales figures, and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and these professionals rarely have audited performance reports. Individuals must carefully choose the right FSP for their own situation and perform their own due diligence. SHOOK's research and rankings provide opinions intended to help individuals choose the right FSP and are not indicative of future performance or representative of any one client's experience. Past performance is not an indication of future results. For more information, please see [www.SHOOKresearch.com](http://www.SHOOKresearch.com). SHOOK is a registered trademark of SHOOK Research, LLC.

Petrocelli Financial Services is not owned or operated by New York Life Insurance Company or its affiliates.

Robert (Bob) Petrocelli  
Petrocelli Financial Services  
+1 954-958-4258

[email us here](#)

Visit us on social media:

[Facebook](#)

[LinkedIn](#)

---

This press release can be viewed online at: <https://www.einpresswire.com/article/649304607>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2023 Newsmatics Inc. All Right Reserved.