

Sidney A. Blum

CFP®, CPA/PFS, ChFC

Sid Founded GreatLight Fee Only Advisors, LLC (GLFOA) in 2005. GLFOA is an affordable planning and investment alternative in the North Shore Chicago and Las Vegas areas. Sid was a co-founder of Successful Financial Solutions, Inc. in 1994, which merged with a large fee-only firm in 2003. Sid does financial planning with an emphasis on income and estate taxes, retirement planning, and investment planning. Sid's has significant background that includes, [Education](#), [Experience](#), [Professional & Community Service](#), and [Professional & Media Recognition](#).

EDUCATION

- University of Illinois, degree in accounting
- CERTIFIED PUBLIC ACCOUNTANT (CPA) 1975
- CERTIFIED FINANCIAL PLANNER™ [CFP®] certification in 1987
- AICPA Certificate of Education Achievement in Personal Financial Planning in 1988
- Chartered Financial Consultant (ChFC) in 1989
- AICPA specialty designation of Personal Financial Specialist (CPA/PFS) in 1991

EXPERIENCE

- Practicing as a CPA since 1975
- Practicing as a financial advisor since 1987

PROFESSIONAL & COMMUNITY SERVICE

- Adjunct Faculty of the College for Financial Planning
 - Financial Planning Section of Roosevelt University in Chicago
 - Northwestern University College for Continuing Studies
- Adjunct Faculty of University of Illinois - Chicago - MBA Program - Personal Financial Planning
- AICPA Resource Panel of the Center for Investment Advisory Services
- Illinois CPA Society
 - Personal Financial Planning Committee
 - Finance Committee
 - Consulting Services Executive Committee
 - Investment Services Task Force and Finance Committee
- Board Member Service - Present and Past
 - Licensed Independent Network of CPA Financial Planners (LINC)
 - Association of CPA Financial Planners
 - Greater Chicago International Association of Financial Planners (IAFP)
 - North Shore Chapter IAFP (as past President and Chairman of the Board)
 - National Association of Personal Financial Advisors-Midwest Regional Board (NAPFA) as President 2002-2003
 - Chair of NAPFA Midwest and Member NAPFA National Board 2003-2004
 - NAPFA National Nominating Committee 2006
 - Chair of NAPFA National Conference 2006
 - Illinois FPA Nominating Committee as V.P. of Corp. Sponsorship for FPA North Shore Council
 - Illinois FPA Advisory Board
 - FPA Illinois Board of Directors 2005
 - Rotary Club of Wilmette, Illinois

PROFESSIONAL & MEDIA RECOGNITION

- Worth's annual list of "The Best Financial Advisers" from 1996 to 2002
- Medical Economics as one of the 150 best financial advisers for doctors since 2000 to 2005
- Dental Practice Report Best Financial Advisers For Dentists 2012
- University of Illinois Business School Alumni Association Leadership Award in 2005
- Contributor to Beyond the 401(k), a book published by Investors Press

- Contributor to Everything Money, published by Adams Media Corporation
- Contributor to Easy Ways to Organize Your Taxes and Money by Publications International in 1999 and updated in 2006
- Contributor to Tips from the Top by Alpha
- Interviewed by several newsletters
 - Accounting Today
 - AICPA Planner
 - Dow Jones Investment Advisor
 - Investment News
 - Moneysworth
- Answered financial and investment questions on several websites
 - www.fundsinteractive.com
 - www.quicken.com
 - www.aol.com
 - www.HowStuffWorks.com
- Contributed to articles
 - Chicago Sun-Times newspaper
 - Chicago Tribune newspaper
 - Money Magazine
 - Fortune Magazine
 - Bloomberg
 - Smart Money
 - Kiplinger Personal Finance
 - Medical Economics
 - North Shore Magazine
 - Illinois CPA Society Insight Magazine
 - numerous other publications
- Television appearances
 - Nationally on Fox's Money program
 - locally on Financial Solutions (AT&T-public access)
 - Making Money (CLTV)
 - Accountability (WCIU- Stock Market Observer)
 - Locally on ABC 7 Chicago
 - Locally on Fox 32 Chicago
- Radio appearances
 - Lee Ann Trotter's local radio show on US99
 - The Noon Business Hour on WBBM 780 AM with Sherman Kaplan & Kris Kridel
 - WGN RADIO 720 AM Money Show with Bill Moller