

PERRY KORSZEN, CFP®, CIMA®

Associate Vice President, Investments

 \searrow

perry.korszen@raymondjames.com

www.korszen.com

Perry is a Florida native who grew up in Englewood and attended Pine View School for the gifted in Sarasota. He then attended the University of Florida, where he majored in finance. While at UF, Perry was a brother in the Alpha Tau Omega fraternity and was a volunteer in the Big Brothers Big Sisters organization.

Upon graduating Perry was commissioned as an officer in the United States Marine Corps. He spent his time in the operating forces as a Platoon Commander for Combat Logistics Battalion 2. Perry was deployed to Afghanistan, where he served as convoy commander for frequent patrols throughout Helmand Province.

In 2013 Perry completed his military service and moved back to Florida to join the Korszen Financial Group as a financial advisor. In 2016, he was awarded the designation of CERTIFIED FINANCIAL PLANNER™ professional after completing the education, experience, ethics and examination requirements. In 2020 he was awarded the designation of Certified Investment Management Analyst®.

He is an active member of the Military Officers Association of Sarasota, the Veterans of Foreign Wars (VFW) and Big Brothers Big Sisters of the Sun Coast.

CIMA ®Chartered Investment Management Analyst ®Investments & Wealth Institute™ (The Institute) is the owner of the certification marks "CIMA®," and "Certified Investment Management Analyst® signifies that the user has successfully completed The Institute's initial and ongoing credentialing requirements for investment management professionals.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, Certified finanCial Planner™, CFP® (with plaque design) and CFP® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Raymond James is not affiliated with any organizations mentioned.



