OPPENHEIMER | THE SHARPE GROUP

Our Mission:

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

Who We Are

The Sharpe Group of Oppenheimer & Co. Inc. offers a collaborative and personalized planning process to establish the foundation of your individualized financial strategy and aspirations. We specialize in serving high net worth families, individuals, and corporate entities by providing comprehensive wealth management services to achieve long-term financial success.

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

Lawrence Rubinstein

Managing Director – Investments
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Lawrence (Larry) Rubinstein is a founding member of The Sharpe Group. Since joining the financial services industry in 1984, Larry has dedicated his esteemed career to serving high-net-worth private clients, corporate accounts, and nonprofit organizations. With over a decade's experience as a NASDAQ Market Maker, Larry also offers a unique insight into securities markets.

As the Branch Office Manager in Princeton, New Jersey and a Managing Director, Larry has cultivated relationships with colleagues across multiple divisions of the firm. His collaborative efforts include partnerships with the Retirement Services Group, Fixed Income trading desks, Oppenheimer Life Agency Ltd. and Oppenheimer Asset Management Inc. (OAM). By leveraging these connections, Larry is able to craft bespoke investment portfolios grounded in strategic asset allocation, tailored for both individual and institutional investors.

Larry's professional achievements have garnered widespread recognition, including being named to the 2024 list of Five-Star Wealth Managers in New Jersey, Top 100 Branch Managers in 2017 by On Wall Street, and earning the title of Best in State Wealth Advisor from 2018-2023 by Forbes/RJ Shook. His seasoned expertise is fortified by a robust array of FINRA registrations, including General Securities Principal (Series 24), General Securities Representative (Series 7), and Equity Trader Limited Representative (Series 55), among others. Additionally, he is licensed as an agent for Life Insurance in multiple states.

A resident of Hopatcong, New Jersey, Larry epitomizes a commitment to both professional excellence and community service. He remains deeply engaged in his community, serving as an active member of various nonprofit and community organizations such as the Twin W First Aid Squad, the Local Pop Warner Organization, and The West Windsor Volunteer Fire Company No. 1, where he once held the role of Fire Chief.

Justin Gelbman, CFP®

Managing Director – Investments
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Justin Gelbman is a Managing Director – Investments at The Sharpe Group. With a deep-seated commitment to client-centric service, he excels in comprehensively understanding the unique needs of his clientele. Leveraging extensive expertise, he specializes in serving multi-generational families, adeptly crafting tailored solutions such as college savings plans, retirement strategies geared towards ensuring sustainable income streams, and meticulously structured estate plans.

His unwavering belief in the significance of precise asset allocation, customized to each client's distinct investment profile, underscores his approach to managing volatility and mitigating risk. Through diligent investment manager selection and vigilant ongoing monitoring, he remains steadfast in his pursuit of delivering optimal outcomes for his clients.

Boasting a distinguished and successful career, Justin has earned recognition as one of Forbes/R.J. Shook's Top 500 Americas Next Generation Wealth Advisors (2017 and 2021) and Best in State Wealth Advisor (2018-2021). He's a Certified Financial Planner® and holds the following FINRA registrations: General Securities Representative (Series 7), the Uniform State Law Exam (Series 63) and the Uniform Investment Advisor Law (Series 65). Additionally, Justin is insurance licensed as an agent for Life, Accident, Health and Sickness in the states of California, Connecticut, Delaware, Florida, Georgia, Illinois, Indiana, Massachusetts, Maryland, Michigan, Missouri, Nevada, New Hampshire, New Jersey, New York, North Carolina, Pennsylvania, South Carolina, and Texas.

Justin earned his B.S. in General Business and Marketing from the University of Maryland, with a citation in Public Leadership and memberships in a number of collegiate honorary societies. He lives in Princeton, NJ, and is involved with several non-profit organizations, embodying his commitment to community and service. Notably, he serves as a dedicated member of the West Windsor Fire Company No. 1. Outside of work, he enjoys tennis, golf, and competitive running, channeling his passion for active living and personal growth.

Michael Corcione, CPFA®

Financial Advisor
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Michael Corcione joined The Sharpe Group in 2018. Specializing in asset allocations and money manager due diligence, Michael is committed to providing impeccable service to clients while also expanding his knowledge in financial markets.

While earning a B.S. in finance and a minor in accounting at Marist College, Michael pursued his passion of playing Division 1 football. In addition to his impressive academic accomplishments, Michael holds a Certified Plan Fiduciary Advisor (CPFA) designation as well as various FINRA registrations, including General Securities Representatives (Series 7) and uniform combined State Law (Series 66). He is also licensed as an agent for Life Insurance in multiple states.

Currently, Michael resides in Red Bank, NJ, where he enjoys watching football, spending time with his family, and volunteering with special needs children through the RallyCap Sports program.

Matthew Carey

Financial Advisor
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Matthew (Matt) Carey joined The Sharpe Group in 2019. As a Financial Advisor, Matt focuses on providing the team with analytical research, due diligence of investment managers, and developing strategic asset allocations tailored to client's unique financial goals.

Matt is deeply committed to assisting individuals, families, and small businesses in reaching their financial aspirations. He specializes in crafting tailored strategies that cater to the individuality of each client's circumstances. Matt firmly believes that adaptability and ongoing monitoring of a comprehensive plan are essential elements in ensuring the attainment of financial objectives.

During his time at Ithaca College, Matt earned notable scholastic achievements including Academic All-American Honors, The Deans Leadership and Distinguished Service Award, and The Jack Bernard Award for Highest G.P.A. Matt graduated with a Bachelors in Business Administration with Summa Cum Laude honors.

Matt holds FINRA registrations including the General Securities Representatives (Series 7) and uniform combined State Law (Series 66). He is also licensed as an insurance agent for Life, Accident, and Health in multiple states. Matt lives in Princeton, NJ.

Amanda Pelczar

Client Service Associate
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Amanda Pelczar brought her expertise to The Sharpe Group in 2022 as a Registered Client Service Associate. As a recent addition to the team, Amanda infuses her role with a fresh perspective, drawing from her educational background to offer innovative insights into financial services. Her enthusiastic approach to client service is evident in her dedication to meeting and exceeding client expectations. Amanda's commitment to excellence and her ability to adapt to the ever-evolving financial landscape make her an invaluable asset to The Sharpe Group.

A graduate of Temple University, Amanda earned a B.B.A. with a concentration in finance and a minor in economics. While earning her degree, Amanda dedicated her free time to Temple's fundraising committee for Women in Finance, and gained experience as a lead analyst in the University's Fox Fund. While in the Fox Fund, Amanda developed her capital markets knowledge and managed a virtual portfolio of U.S. equities.

Amanda currently resides in Bucks County, PA, and enjoys traveling and cooking.

Dana DiSerio

Client Service Associate
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Dana DiSerio joined The Sharpe Group in 2023 as a Registered Client Service Associate. A graduate from the University of Delaware, Dana double majored in finance and financial planning and wealth management. While pursuing her studies, Dana earned Dean's List recognition throughout multiple semesters.

Leveraging her educational background, she is dedicated to delivering exceptional client service and support. Dana's strong analytical skills and attention to detail enable her to effectively address the unique needs of each client. Her commitment to excellence and proactive approach ensure that clients receive the highest level of personalized service.

Dana also holds a General Securities Representatives (Series 7) from FINRA. She resides in Manalapan, NJ, where she enjoys hobbies including reading, traveling, and cooking.

Noah Wills

CLTC®, CPFA®

Associate Director - Investments
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Noah Wills joined Oppenheimer in March 2024, bringing with him a wealth of expertise in guiding clients through their financial journeys. Specializing in assessing risk tolerance and crafting personalized investment strategies, Noah is dedicated to helping clients achieve their financial goals.

He holds multiple FINRA registrations, including Series 6, 7, 63, and 65, along with life and health insurance licenses. Additionally, Noah is a Certified Long Term Care Consultant (CLTC®) and a Certified Plan Fiduciary Advisor (CPFA®), and completed his financial planning education at the NYU School of Professional Studies.

Before joining Oppenheimer, Noah served as a Financial Advisor at Fortuna Wealth and as an Associate at Lenox Advisors. His academic background includes a Bachelor of Science in Information Sciences & Technology with a Business Minor from Penn State University, where he actively participated in the Penn State Investment Association and was a member of the Alpha Epsilon Pi Jewish Fraternity.

Originally from Rockland County, NY, Noah now resides in Boca Raton, FL, where he enjoys golf, NBA basketball, and being an avid film critic.

James Bladel

Director – Investments
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James (Jim) Bladel joined The Sharpe Group as a Senior Director of Investments. With over 30 years of experience in the financial services industry, Jim focuses on supporting high-net-worth individuals, families, and institutions to achieve their financial goals by developing tailored strategies aimed at growing, managing, and preserving wealth.

As a Senior Director of Investments, Jim is passionate about providing excellent client service. A seasoned industry veteran, he first joined Oppenheimer in 1992. Jim takes pride in applying his copious financial sector knowledge by skillfully defining his client's risks and objectives to construct diversified asset allocation strategies.

A graduate from the University of Virginia, Jim earned a B.A. in economics in 1982. His experience is amplified through multiple FINRA registrations including General Securities Representative (Series 7), General Securities Principal (Series 24), and Registered Options Principal (Series 4), among others. Additionally, Jim is licensed as an agent for Life and Variable Insurance in multiple states.

Residing in Chesterfield, NJ, Jim is an active member of his community and volunteers as a coach for multiple local youth baseball organizations. He also enjoys attending services at his local church, along with hobbies such as walking and biking along the beach.