www.cprp.com
https://www.facebook.com/cprpinc
https://www.linkedin.com/company/cprpinc

Media Inquiries
Sylvie Tse
stse@marlomarketing.com
617-375-9700

Compass Point
RETIREMENT PLANNING

Compass Point Retirement Planning is a financial advisory firm in Wakefield, MA, advising more than 600 client families who have entrusted them with over $470 million of their critical retirement income savings. Compass Point Retirement Planning is the nation's only advisory firm offering the TRU™ Method, a proprietary process that identifies and corrects the principal cause of retirees outliving their money during retirement when using traditional approaches for estimating safely available income levels.

Compass Point Retirement Planning was founded in 1995 by Michael J. LaBrie and Thomas F. Nee, Jr., who were joined shortly thereafter by Martin Plecinoga.

Executive Bios

Michael J. LaBrie
AAMS, AIF, RMA, CFS
Founder, President,
Owner and Advisor

As president and co-founder of Compass Point Retirement Planning, Michael LaBrie is part of the executive team and serves as the day-to-day manager of operations. Michael previously worked as an engineer at a consulting firm that helped Fortune 500 companies bring products to market. He made the shift to the financial world where he acts as an "income engineer" helping clients optimize planning and investment decisions to meet their retirement goals.

Michael was named a 2012 Five Star Wealth Manager Award winner by Five Star Professional and was one of the first registered representatives in the industry to achieve the designation of Accredited Asset Management Specialist (AAMS).

Michael holds a bachelor's degree in engineering from Clarkson University. In his spare time, Michael enjoys anything to do with boats or being on the water. Michael and his wife Suzanne live in Marblehead, and he has three sons and one daughter.

Thomas "Tom" Nee, Jr.
Founder,
Owner and Advisor

Thomas F. Nee, Jr. is co-founder and owner of Compass Point Retirement Planning. He is a principal advisor helping his clients navigate the retirement landscape, as well as helping to manage the day-to-day operations of Compass Point Retirement Planning.

Tom has dedicated most of his 28 years in the retirement planning industry to educating families going into retirement and helping make sure they can maintain their lifestyle without running out of income. He spent over 12 years teaching retirement courses for pre-retirees at local colleges and universities.

Tom attended Merrimack College, where he received his bachelor's degree in business administration. He also played goalie on the Merrimack lacrosse team and met his future wife there. He and Ellen, along with their three sons, live in Boxford where Tom is part of the call fire department. When he's not helping people with their retirements, Tom might be out helping friends and neighbors in their times of need.

Executive Bios

Martin "Marty" E. Plecinoga
CFS
Founder,
Owner and Advisor

Marty Plecinoga is an owner and advisor of Compass Point Retirement Planning. He previously worked in the geotech field before joining Tom and Michael to help grow the business. At Compass Point Retirement Planning, Marty helps clients define appropriate goals and target true financial independence.

Marty attended Salem State University, where he received his bachelor's degree in geology and cartography. Marty enjoys building boat models from scratch in his spare time and once caught a 916-pound giant bluefin tuna that sold for $18,000 at auction. He has a son and a daughter and lives in Danvers.

Katherine "Kate" Glidden
NSSA, RMA
Registered representative

Kate Glidden is a registered investment advisor representative at Compass Point Retirement Planning. She joined Compass Point Retirement Planning in 2001 and became securities licensed in 2008. At that point, Kate made the transition to advisor and enjoys helping her clients navigate the transition to retirement and reach their current and future goals.

Kate graduated from the University of Vermont and spent her junior year studying at the University of Economics in Prague. She lives on Cape Ann with her significant other, Jesse, a dog and two cats. She and Jesse are active in local charities and they enjoy traveling as often as possible.

Richard "Rick" P. LeBlanc
Registered representative

Rick LeBlanc is a registered investment advisor representative at Compass Point Retirement Planning and has been with the firm since 2016. His passion for helping others translates into a natural alignment with the core beliefs of Compass Point Retirement Planning.

Rick attended University of Maine at Farmington, where he received his bachelor's degree in business and economics. Rick was vice president of the university's Ski Industry Club, where he oversaw fundraising and community service events. He also volunteered in the local Learn to Ski program, teaching grade school children to ski at a small, local mountain in Farmington.

Rick met his wife, May, during his junior year of college. They now live in Watertown with their three young children. In his spare time, Rick enjoys being outdoors with his family and teaching his children to ski in New Hampshire's White Mountains.

\# \# \#