



**The Organization**

GenFi is an independent investment advisory and consulting firm that helps families and institutions prioritize complex investment and planning goals by impact.

**Headquarters**

1016 West Jackson, Chicago IL 60607

**Website**

www.genfiffs.com

**Mission**

In an industry increasingly plague by conflicts of interest and deteriorating ethics, GenFi's mission is to serve as a role model for fiduciary responsibility, promote financial literacy through generations, and be a knowledgeable, objective advisor and advocate for its clients.

**Founded**

2011

**Industry**

Financial Services (Consulting and Investment Management)

**Executive Team**

The GenFi executive team includes a respected leader with decades of experience at a major investment bank, Big 4 Accounting firm, and a multi-family office.

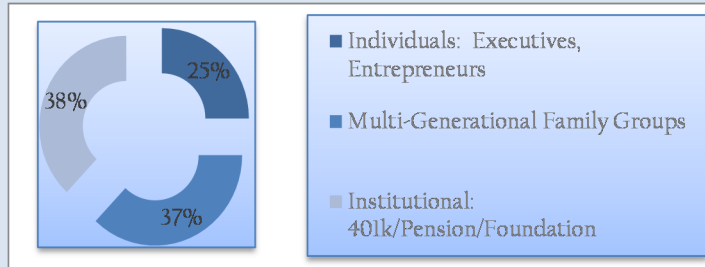
- Julie Zakarias, CPA, CFP®, Formerly with Deloitte, Credit Suisse and InterOcean

**Media Contact:**

**Julie Zakarias**  
[jzakarias@generationsffs.com](mailto:jzakarias@generationsffs.com)



**Markets Served**



**Services Provided:**

Family Office services	Investment Management	401k and Pension Consulting	Financial Planning
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**GenFi Family & Fiduciary Services was formed to Advance This Mission:**

- Guiding Clients to their best financial decisions as truly independent advocates
- Utilizing an unbiased, unlimited universe of investment products and strategic solutions
- Providing Clients with the same sound advice we provide to our families
- Bringing access to the best resources available and maximizing long term client results
- Client Privacy and Confidentiality