

Rutherford Asset Planning marks 25th anniversary

Written by Special to the Filipino Reporter
Friday, 03 June 2011 21:26



Rutherford Asset Planning, Inc. celebrated 25 years in business by hosting a cocktail reception and dinner party for clients.

Pictured above from left to right are Ronald K. Rutherford, firm co-founder; Loida N. Lewis of New York City and Manila; Dr. Jovencio Jaravata of Lakewood, New Jersey and Maricopa, Arizona; Suzzette B. Rutherford, firm co-founder; Amelia Jaravata, wife of Dr. Jaravata; and Keith Amburgey, partner in the firm.

Before retirement, Dr. Jaravata was a surgeon in the Philippines.

Ms. Lewis became CEO of TLC Beatrice after the death of her spouse Reginald F. Lewis.

After selling the company she devotes much of her time to philanthropic activities.

Rutherford Asset Planning marks 25th anniversary

Written by Special to the Filipino Reporter
Friday, 03 June 2011 21:26

Suzzette Bagaybagayan Rutherford is a graduate of the College of the Holy Spirit and the University of the Philippines.

She also attained a master of business administration from New York University, as well as a juris doctor degree from Brooklyn Law.

She is admitted to the bar to practice law in five states.

She is a certified financial planner.

Mr. Rutherford holds a masters degree in engineering and a master of business administration degree.

He is a certified financial planner and a certified investment management analyst.

Amburgey holds a masters of business administration degree.

He is a chartered financial analyst and a certified financial planner.

The primary speaker was James P. Owen.

He was chosen because of his focus on restoring the basic values that made America great.

He targets young people mainly at the high school level.

Rutherford Asset Planning marks 25th anniversary

Written by Special to the Filipino Reporter
Friday, 03 June 2011 21:26

Owen established a foundation for this purpose called the “Center for Cowboy Ethics and Leadership.”

Pilot programs are under way in Colorado.

Owen authored three books in this subject area: Cowboy Ethics, Cowboy Values and Try.

Rutherford Asset Planning has as its business model the multi-client family office.

They take a tailored, comprehensive, holistic approach to helping clients manage their financial and tax affairs.

The process reaches across multiple family generations.

Client services include investment management, income tax planning, retirement planning and estate planning.

Contact Ronald K. Rutherford, Rutherford Asset Planning, Inc., Naples telephone 239.261-3344; New York telephone 212.836.4343; website: www.rutherfordasset.com; 5150 Tamiami Trail North, Suite 204, Naples, FL 34103; 445 Park Avenue, 9th floor, New York, NY 10022.