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Robert Westley, CPA, CFP®, PFS – 2022 40 Under 40 Honoree



Regional Senior Wealth Advisor

Northern Trust

<https://www.northerntrust.com/united-states/home>

Robert is a Regional Wealth Advisor at Northern Trust responsible for advising the most sophisticated clients in the Northeast region. He specializes in the development, implementation, and oversight of financial, estate and tax plans for high-net-worth individuals, C-suite executives, and affluent families. He works closely with clients to help optimize their wealth within a goals-based construct utilizing financial modeling and analytics. Robert is frequently sought after as a wealth management and tax expert in the national financial media and has been featured in the Wall Street Journal, New York Times, Barron's, Washington Post, Chicago Tribune, CNBC, Market Watch, Kiplinger, and USA Today. He has authored many articles and columns for professional journals including the Journal of Financial Planning, Journal of Accountancy, and The Tax Adviser.

Robert volunteers as a member of the AICPA's National CPA Financial Literacy Commission. The commission leads the CPA profession in a national effort to advance the financial literacy of Americans. As a volunteer, he works to raise awareness of the importance of financial literacy education, helps to build liaisons within the financial literacy community, and serves as a media spokesperson

promoting financial literacy. He also volunteers his time advancing the knowledge of

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