



# Ruvin Levavi

## Founder & Principal

With his background as an estate planning attorney, a decade as a financial advisor, and hailing from a family with 40 years in the financial services industry, Ruvin Levavi has been immersed in the financial and estate planning world. From the outset his mission has been to help clients reach their personal financial goals while creating generational wealth. In Ruvin’s view, the financial industry had evolved to meet the bottom-line goals of advisors and their firms rather than those of their clients. As the founder and principal of Power Forward Group, Ruvin set out to build a financial and estate planning practice focused firmly on helping his clients identify and achieve their goals.

“Success begins with a plan; the returns will follow.” Graduating from Fordham University School of Law, Ruvin understood the importance of having a plan when it came to his client’s estates and realized the same model needed to be extended to their financial goals. No self-respecting attorney would draft a will or a trust without a comprehensive estate plan, financial advisors must be held to the same standard. According to Ruvin, investing without a plan is akin to picking stocks out of a hat. In Ruvin’s view, the financial services industry is a tale of two extremes: It’s an archaic system of Agents who model their practice on selling financial products, or self-titled “Wealth Managers” only helping clients who meet a specific minimum net worth threshold. Clients are targeted by what they have rather than who they are. Power Forward Group was designed to “disrupt the paradigm.”

Having graduated from Law-School in 2009, overwhelmed with student debt during a generational recession, Ruvin personally experienced a financial services world ill-equipped for clients like him. Optimistically viewing himself as an undervalued asset with a negative net-worth – not exactly the type of client meeting the minimums for traditional wealth managers - Ruvin set out to serve clients with similar challenges. Creating Power Forward Group as an independent practice allowed Ruvin to alter the traditional model. At PFG their goal is to “help our clients invest in their personal financial success while we invest in them”. As value investors, PFG aims to begin working with clients as early as possible. They cultivate smart, talented clients with the hunger and vision to grow. The firm’s motto: The faster you grow, the faster we grow.

The Power Forward Group team has been expanding rapidly. The growth is based on a two-pronged approach. PFG’s continued embrace of fintech allows the team to provide increased real time coaching and support to their clients. According to Ruvin this trend will accelerate as Power Forward Group leverages technology powered by advisors. Their advisor-centric model is just as important to continued growth. Adding advisors who are passionate about the markets in which they advise has organically created amazing networks. The group’s advisors naturally become thought leaders and experts in their specific markets. This approach has allowed Power Forward Group to specifically tailor their planning process in collaboration with their clients. The success is evident in their work with attorneys, dentists, and the EmpowHer community. According to Ruvin, “we work with extremely bright clients, our collaborative planning process is not designed to create financial plans and portfolios for our clients but rather with them.

“

we work with extremely bright clients, our collaborative planning process is not designed to create financial plans and portfolios for our clients but rather with them.



**CONTACT:** \_\_\_\_\_

2 Park Ave, Suite 300, New York, NY 10016  
646.647.2150 | [www.powerforwardgroup.com](http://www.powerforwardgroup.com)