

PERSONAL FINANCE FOR REAL ESTATE AGENTS

Our Purpose

For over two decades, RockCrest has advised real estate professionals on their personal finances. Our advisors, Steven and Aiden Boorstein, with their extensive real estate experience, understand real estate agents and their unique challenges and opportunities. This drives us to tailor our services specifically to real estate brokers and agents.

Contact Our Advisors:

Steven Boorstein, PharmD, CFP®
steven.boorstein@rockcrestfinancial.com
856.694.3288

Aiden Boorstein
aiden.boorstein@rockcrestfinancial.com
856.694.3299

Office: 551 New Rd, Suite B, Somers Point NJ 08244

How We Can Help

01

Comission Check Cash Management

We can help manage your commission checks cash flow, helping you set aside enough money for taxes, expenses, and invest appropriately to achieve your financial goals.

02

Create a Masterplan for Your Real Estate Investments

We can help incorporate real estate investments into your financial plan. For example 1031 DST & 721 UPREIT Exchanges, Opportunity Zone Funds, and helping evaluate potential cash flow on investment properties.

03

Personal, Retirement Accounts & Investment Management

We can help you invest in equities, fixed income, alternative investments, and real estate. Whether it's in taxable accounts, for flexibility, or retirement accounts like a Solo 401(k), SEP IRA, Roth IRA or Traditional IRA, we can help you figure out the best types of accounts for your situation.

04

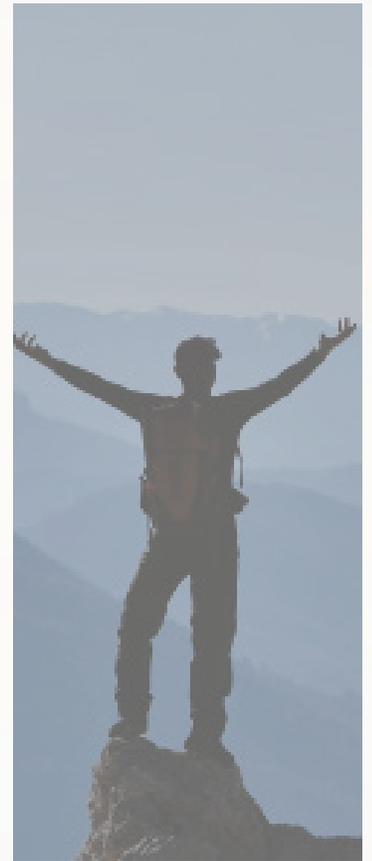
Customized Tax Strategies

We do extensive tax planning and analysis to help you employ advanced tax strategies that optimize your tax situation and fund your retirement.

05

All-In-One Personal Finance

We help you manage just about all aspects of your personal finances, including coordinating with your financial professionals, so you can relax knowing our one-stop shop has you covered.



Personal Finance CEO

We are here to coordinate and simplify your financial life so that you can focus on what you love doing. We take an active role in helping to get your financial house in perfect order and keep it that way!

