

S&N Publishing

Author Bio



In 2007 Sandeep Varma was named one of the "Top 100 Independent Financial Advisors in America" by *Registered Rep.* magazine. In addition Sandeep attended the invitation-only *Barron's Top 100 Financial Advisors* conference in New York.

Sandeep is the creative mind and backbone of ATS Financial Services. As a financial advisor for over 18 years he has made it his goal to help families plan for their futures. With comprehensive knowledge of diverse and sophisticated investment vehicles, he specializes in working with clients and a team of advisors to implement advanced estate strategies.

In 1995 he created the '7 Biggest Mistakes Trustees Often Make' seminar to help trustees plan properly. Since then he has devised additional educational tools to assist advisors and clients in this complicated area of financial planning. Sandeep conducts in-depth, small group or one-on-one training for advisors and professionals. He also speaks regularly at regional and national conferences and symposiums, helping advisors to educate clients and implement advanced strategies for them.

His strategies not only allow clients to achieve their goals but have also resulted in over \$50 million being gifted to local and national charities such as American Red Cross, Sitrin Healthcare Foundation, SHARP HealthCare Foundation, Palomar Pomerado Health Foundation, St. Vincent de Paul, the Blood Bank, Boy Scouts of America, & Children's Hospitals of Oakland and San Diego.

He is a dedicated family man. His partner and wife, Nisha, and their children, Ashni, Smita, and Sanjeev, are often seen accompanying them to the office and are enjoyed by the staff as well as visiting clients. He puts high value on family, which is often reflected in his work with clients and is the reason behind his multi-generational planning.