



## Anthony J. Caltabilota, Jr., CFP®, CDFA™, CLU, EA President and CEO

Phone: (732) 335-8500  
Fax: (732) 335-8560  
E-Mail: [acalta@ncfg.com](mailto:acalta@ncfg.com)  
[www.CaltaFinancial.com](http://www.CaltaFinancial.com)

Financial Planning  
Retirement Planning  
Estate Planning  
Education Planning  
Insurance & Annuities  
Private Asset Mgmt.  
Equity Investments  
Fixed Income  
Global Wealth Mgmt.  
REITs

Anthony J. Caltabilota, Jr., is the founder and President of Calta Tax & Financial Services, LLC located in Matawan, NJ. This independent financial planning and tax preparation Firm was established in 2003 and has focused primarily on providing expert tax and financial advice for a diverse array of clients.

Anthony graduated from Rutgers University in 1995 with a Bachelor of Science in Finance. Throughout his post-graduate years, Anthony also became a Certified Financial Planner®, a Chartered Life Underwriter, an Enrolled Agent with the Internal Revenue Service, and a Certified Divorce Financial Analyst™. Anthony began his career as a Junior Vice President in the Investment Credit Analyst department at Chemical Bank in New York City. He then went on to Gulf International Bank where he was promoted to Vice President in the Investment Credit Analyst Department. In 1998, Anthony began working in Hazlet, NJ as a professional Financial Planner and Tax Accountant. It was from here that he started his own practice, Calta Tax and Financial Services, LLC.

A few accolades and achievements worth mentioning include being a featured guest on News 12 NJ "It's Your Money Show" where he discussed different tax and investment strategies. He was also an educator and adjunct faculty member at Farleigh Dickinson University Division of Continuing and Graduate Studies in the CFP® approved certificate program. Anthony was also personally involved with the American Red Cross and spent time in Louisiana assisting directly with the Katrina relief effort.

The greatest joy in Anthony's life is spending time with his two daughters, Jamie and Giavanna. An avid sports fan, he enjoys watching and attending sporting events, especially cheering on the sidelines at his children's sporting events.

**CALTA**  
Tax & Financial Services, LLC  
99 Main Street, Matawan, NJ 07747  
Phone: 732-335-8500 . [www.caltafinancial.com](http://www.caltafinancial.com)

Securities offered through Osaic, Inc., member FINRA/SIPC. Investment advisory services offered through New Century Financial Group, LLC. Osaic, Inc. is separately owned and other entities and/or marketing names, products or services referenced here are independent of Osaic, Inc. Neither Osaic, Inc. nor its representatives provide legal or tax advice. If legal or tax advice or other expert assistance is required, the service of a currently practicing professional should be sought.