

MARIO

SICARI

SPEAKER  
EXECUTIVE LEADER  
TRUSTED PERSPECTIVE

*Mario Sicari*

MARIO SICARI



CLARITY.  
CREDIBILITY.  
IMPACT.

Trusted perspective. Practical leadership.

CLARITY • CREDIBILITY • IMPACT

AUTHOR • SPEAKER • FINANCIAL EDUCATOR

## POSITIONING STATEMENT

<sup>01</sup> For more than three decades, Mario Sicari has helped individuals, families, and business owners navigate important financial decisions. As a financial advisor, author, and speaker, he is committed to helping clients better understand the financial issues that affect their lives and long-term goals. When acting in the capacity of an investment adviser representative, Mario serves in a fiduciary capacity.



Mario emphasizes financial discipline, financial literacy, and informed decision-making as the foundation of effective wealth management. His focus is on helping clients develop strategies designed to *build, preserve, and transfer wealth across generations*, while providing personalized guidance aligned with their unique objectives and circumstances.

## ABOUT MARIO

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### BIOGRAPHY

Mario V. Sicari has more than 30 years of experience in the financial services industry and is the founder of BGS Capital Management.

He is the author of two books, *The Art of Creating Wealth* and *The Art of Preserving Wealth*, written for people at different stages of their financial journey.

Mario works with individuals and families across generations, from younger adults beginning to build strong financial foundations to Baby Boomers, retirees, business owners, and families thinking about preservation, transition, and legacy.

|                                                          |                                                        |                                               |
|----------------------------------------------------------|--------------------------------------------------------|-----------------------------------------------|
| <div>30+</div> <div>Years in financial services</div>    | <div>\$400M+</div> <div>Assets under management</div>  | <div>27</div> <div>U.S. states licensed</div> |
| <div>2012–2021</div> <div>Cetera Executive Council</div> | <div>2022–2025</div> <div>Cetera Diamond Council</div> | <div>2</div> <div>Published books</div>       |

SIGNATURE TOPICS

What Mario speaks about

Equally at home on a wealth-focused podcast, a business stage, or in a professional-education setting, Mario translates complex financial ideas into practical, accessible conversations for audiences at different stages of their financial lives.

- 01

**Financial Literacy for a New Generation**

Why Gen Z, Gen X, and Millennials face money on harder terms, and the basics (budgeting, credit, 401(k)s, Roth, the time value of money) that change the trajectory.
- 02

**The Great Wealth Transfer**

The largest generational transfer of wealth on record is underway. Mario explores how families think about retirement, estate planning, succession, preservation, and multigenerational decision-making, themes also explored in *The Art of Preserving Wealth*.
- 03

**Ignore the Noise: Long-Term Investing**

Dollar-cost averaging, broad-market discipline, and tuning out the headlines that derail investors. A 2008-forward case for advice built on trust, not transactions.
- 04

**Invest in Yourself**

Empowerment, communication, and networking as financial skills, why the best return many people overlook is the one they earn by growing their own capabilities.
- 05

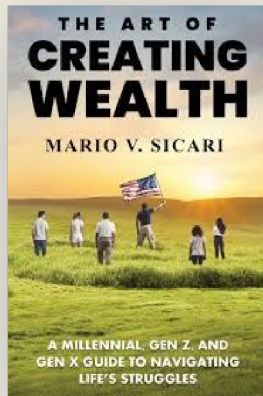
**The Real Cost of Inflation & Debt**

How monetary policy, deficits, and affordability pressures show up in mortgages, groceries, and everyday life, translated into plain language for non-economists.
- 06

**Building an Advisory Practice**

For business and CPA audiences: integrating financial planning into a practice and adapting to a technology-driven client environment.

## Written for every stage of the journey



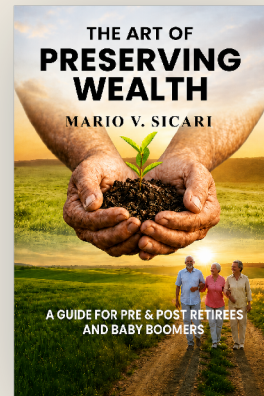
### The Art of Creating Wealth

*A Millennial, Gen Z and Gen X Guide to Navigating Life's Struggles*

A practical, generation-specific guide to investing, credit, financial literacy, critical thinking, and the habits that can help younger generations build stronger financial foundations.

AVAILABLE ON AMAZON

[amazon.com/dp/B0F4SK7PCF](https://amazon.com/dp/B0F4SK7PCF)



### The Art of Preserving Wealth

*A Guide for Pre & Post Retirees and Baby Boomers*

Written for pre- and post-retirees and Baby Boomers, *The Art of Preserving Wealth* explores protecting what you have built, preparing for retirement and transition, and passing wealth forward with intention.

AVAILABLE ON AMAZON

[amazon.com/Art-Preserving-Wealth-Retirees-Boomers/dp/1949513556](https://amazon.com/Art-Preserving-Wealth-Retirees-Boomers/dp/1949513556)

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*Two books. Two stages of the financial journey. One continuing conversation about how people build, preserve, and transfer wealth across generations.*

### ABOUT THE AUTHOR

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Mario brings more than 30 years of experience in financial services to his writing and speaking. When acting in his capacity as an investment adviser representative, he serves in a fiduciary capacity.

His focus is on helping individuals and families better understand financial concepts and make informed decisions that support their personal goals and objectives.

As a speaker, Mario combines real-world experience with practical insights to engage audiences ranging from first-time investors to business owners and retirees. His presentations emphasize financial education, disciplined planning, and actionable strategies that attendees can consider as they evaluate their own financial situations.

# Recent appearances

**CFO at Home · Parts 1 & 2**  
Host: Vince Carter · April 2026

A two-part conversation on *The Art of Creating Wealth*: long-term investing, dollar-cost averaging, 401(k) and Roth basics, teaching kids about money, and ignoring the noise.

[podcasts.apple.com/podcast/id1522403630](https://podcasts.apple.com/podcast/id1522403630)

**The Backpack Trader · Ep. 18**  
Host: Troy Noonan · April 2026

The post-2008 shift to advisory models, the national debt, inflation and currency value, and why financial literacy among young people matters now more than ever.

[podcasts.apple.com/podcast/id1855632593](https://podcasts.apple.com/podcast/id1855632593)

**Our Family Invests**  
Host: Mike Neubauer · June 2026

**The Millionaire Choice**  
Host: Tony Bradshaw · June 2026

**Disruptive Successor**  
Host: Jonathan Goldhill · June 2026

**Built to Finish**  
Host: Steven Pivnik · June 2026

**MONEY 911**  
Host: Kris Miller · July 2026

Available for podcasts, panels, conferences, business seminars, financial-literacy programs, and professional-education settings. Sessions can be structured with learning objectives and educational takeaways for the host organization's review.

FOR HOSTS

## Suggested interview questions

- 01 Is it ever too late to start creating wealth, and where does someone with nothing saved actually begin?

03 Why do so many of us know we should budget, and still fail at it?

05 What changed for advisors and clients after 2008, and what should investors have learned?

07 How has communication around money broken down between generations, and how do we fix it?
- 02 What does "ignore the noise" really mean for an investor checking their phone ten times a day?

04 How should young people think about the college-debt decision today?

06 The largest wealth transfer in history is underway. What should families be doing right now?

08 What's the one financial habit you wish every 25-year-old would start this year?

## CREDENTIALS & RECOGNITION

### DESIGNATIONS & LICENSES

- Accredited Investment Fiduciary (AIF®)
- Chartered Life Underwriter (CLU)
- Chartered Financial Consultant (ChFC)
- Chartered Leadership Fellow (CLF)
- Series 7, Series 24, and Series 66 registrations
- Licensed in 27 states
- NJ NMLS #269691
- NJ Notary & Signing Agent

### RECOGNITION & ROLES

- Cetera Executive Council · 2012–2021
- Cetera Diamond Council · 2022–2025
- Five Star Wealth Manager · 2017, 2019, 2020, 2021, 2024
- Founder, BGS Capital Management
- Founder, BGS Assurance
- Former NASBA provider of continuing education
- Author of *The Art of Creating Wealth*
- Author of *The Art of Preserving Wealth*

## SPEAKING & MEDIA INQUIRIES

### MEDIA RELATIONS

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### MARIO

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### OFFICE

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### LINKEDIN

linkedin.com/in/mariosicari

### SPEAKER WEBSITE

mariosicari.com

### FIRM WEBSITE

bgscapitalmanage.com

### REGISTERED OFFICE

BGS Capital Management, LLC · 201 W Passaic Street, Suite 301 · Rochelle Park, NJ 07662

### MEDIA RELATIONS MANAGED BY INFLUENCE BUILDER

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The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria. Credentialed as a registered investment adviser or a registered investment adviser representative. Actively registered as a registered investment adviser or as a principal of a registered investment adviser firm for a minimum of 5 years. Favorable regulatory and complaint history review. Fulfilled their firm review based on internal standards. Accepting new clients. One-year client retention rate. Five-year client retention rate. Non-institutional discretionary and/or non-discretionary client assets administered. Number of client households served. Education and professional designations. For more information on the Five Star award and the research/selection methodology, go to [fivestarprofessional.com](http://fivestarprofessional.com). Listing in this publication and/or award is not a guarantee of future investment success. This recognition should not be construed as an endorsement of the advisor by any client. No compensation was provided directly or indirectly by the recipient for participation or in connection with obtaining or using the third-party rating or award.

# Mario V. Sicari

AIF® · CLU · ChFC · CLF

Director &amp; Founder, BGS Capital Management

Author · Speaker · Financial Educator



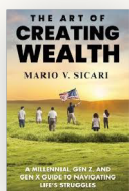
## WHY MARIO

For more than three decades, Mario Sicari has helped individuals, families, and business owners navigate important financial decisions. As a financial advisor, author, and speaker, he turns complex financial topics into *clear, practical takeaways every generation can act on.*

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- ii. The Great Wealth Transfer
- iii. Ignore the Noise: Long-Term Investing
- iv. Invest in Yourself
- v. The Real Cost of Inflation & Debt
- vi. Building an Advisory Practice



### The Art of Creating Wealth

For Millennials, Gen Z, and Gen X  
building strong foundations



### The Art of Preserving Wealth

For pre- and post-retirees and Baby Boomers

AVAILABLE  
ON AMAZON

## Book Mario for your stage or show.

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