



Ash Ahluwalia, CFP®

Wealth Management and Social Security Planning

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Ash Ahluwalia is a sought-after thought leader, specializing in Social Security planning, wealth management, and retirement income planning. As Managing Director and Head of Social Security Planning at OneTeam Financial, he brings three decades of experience helping countless clients develop customized claiming strategies that can add significant value to their retirement income.

After earning his Bachelor of Commerce degree from the University of Toronto and becoming a Chartered Accountant, Ash pursued his MBA at Wharton Business School and also obtained his Certified Financial Planner® designation. As the former president and founder of National Social Security Partners, he has established himself as an authority on Social Security planning and in the industry, earning the **2025 NJBIZ Leader in Finance Award**.

Ash's expertise helps clients avoid costly mistakes and optimize their benefits based on their unique situations. His insights have been featured in major

on podcasts, and provides continuing education for CPAs and attorneys, sharing his expertise on Social Security strategies as part of holistic financial planning. His television appearances include "The Stoler Report" and "Moe Ansari Wall Street Wrap-up."

Originally from Toronto, Canada, Ash has lived in Madison, New Jersey for over 25 years with his wife and three children. He stays active playing ice hockey, golf, tennis, and pickle ball, while also enjoying travel and fitness. He actively supports his family's charity, "Autism Is Curable."

CERTIFICATIONS

- Certified Financial Planner (CFP®)
- National Social Security Advisor (NSSA®)

NJBIZ collected nominations from their service area in 2025 and charged a fee of \$75 per nomination. Mr. Ahluwalia was nominated. Honorees were chosen by a panel of independent judges with financial industry experience. Selections are based on the nominees' involvement in their fields and communities and their professional achievements. For 2025, there were more than 40 honorees for the categories: banking, corporate, investment, professional and blockchain. Third-party rankings and recognition from rating services or publications are no guarantee of investment success. Working with a highly rated advisor does not ensure a current or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any client's evaluation. Generally, ratings, rankings and recognition are based on information prepared and submitted by the advisor. March 2025.