FPA NCA
FINANCIAL PLANNING ASSOCIATION
NATIONAL CAPITAL AREA

CLASSIFIED CONNECTION

Volume 3, No. 4, April, 2011
Web address: **www.fpanca.org**

FPA NCA CLASSIFIED CONNECTION GUIDELINES FOR ALL ADVERTISING:

1. The FPA NCA Classified Connection is a member benefit professional development newsletter to include job postings, mentoring and internship programs, job seeker resumes of CFP® certificant professionals and candidates attending local college/university programs, invitation to CFP® certificant exam study groups, and scholarships and award announcements. The FPA NCA does not recommend and/or endorse any particular advertisement
2. No graphics, logos, or pictures associated with any advertisements will be included in this advertising publication.
3. FPA NCA has the right to refuse or modify any ads submitted prior to publication.
4. Ads must be submitted in Microsoft WORD format.
5. Ads must be submitted by the 20th of each month for inclusion in the next month's publication.
6. This advertising newsletter will be posted to our local chapter web site (www.fpanca.org) and announced via email to our members.
7. Changes to a published ad or removal of the ad will occur once a month prior to the new publication being posted and announced. Notices of changes and/or removals must be submitted by the 20th of each month.
8. Ads will be published for three consecutive months. Requests for ads to be reinstated after the initial three months must be sent by the 20th of the month for inclusion in the next month's publication.

Thank you for following these guidelines so that we can post your advertisement quickly and efficiently! You may send your ads to PeggyNelson8@verizon.net. Thank you!

ERIC J. FIALA

643 K Street NE
Washington, DC 20002

952.994.1641
ericjfiala@yahoo.com

OBJECTIVE

To obtain a position in the Financial Planning industry where I can use my skills and education to advance my goal of carrying the CFP® Certification designation.

EDUCATION

2010 — **Georgetown University - Certificate in Financial Planning**

2000- 2004 — **St. Olaf College, Northfield, MN**
B.A. Sociology/Anthropology/Asian Studies

EXPERIENCE

01/10 - Present — **Wachovia, A Wells Fargo Company, Greater Washington DC**
Service Manager

Coach and develop teller banker team to exceed individual and team service and sales goals. Conduct needs assessment for individual clients to effectively refer to correct department or banker. Oversee teller and banker management of customer accounts. Manage all operations and compliance for store and transition to Wells Fargo systems. Oversee branch human resources including hiring, training, mentoring, and transfer/termination.

02/09 – 01/10 — **Wachovia Corporation, Greater Washington DC**
Financial Center Manager

Managed the overall performance of the financial center. Coached and developed team members to individual sales and service goals. Lead financial center team to achieve superior client service. Exceeded all branch sales and referral goals during tenure. Educated clients about bank products and made appropriate recommendations to achieve financial goals. Opened and closed client accounts, performed account transfers and updates, and processed wire transfers.

05/07 – 02/09 — **Wachovia Corporation, Capital West Region, McLean, VA**
Teller Manager

Directly oversaw all teller activities in the financial center including service, sales goals, and staffing to optimize client-bank relationship. Partnered with other Wachovia departments to more effectively retain existing and recruit new clients. Managed human resources issues including hiring, coaching, training, and discipline. Trained and mentored new hires.

02/06- 05/07 — **Wachovia Corporation, Bloomington, MN**
Participant Account Representative

Provided superior client service and information about participant investments in profit sharing and defined contribution retirement plans. Explained technical information to participants to facilitate understanding. Worked with a team to increase the efficiency and quality of participant services. Communicated with and supported a diverse group of clients.

06/05- 02/06 — **Pei Wei Asian Diner, Woodbury, MN**
Store Manager

Opened and operated a restaurant in a new market. Developed and implemented a flexible, organized and cost effective system of operation. Hired, trained and motivated a team of employees. Successfully operated a profitable restaurant while maintaining a high standard of customer service. Confronted challenges and crafted innovative solutions to the problems of opening a business in a new market. (1/11)

PART TIME INTERSHIP POSITION

The Financial Planning Association™ of the National Capital Area (FPA NCA) is seeking a part-time intern to assist in the implementation of the marketing plan for the Chapter's 2012 Annual Winter Symposium – Estate, Tax and Financial Planning for High-Net-Worth Aging Clients! The FPA NCA seeks to strengthen relationships with CFP® student candidates through mentoring, connecting and sharing.

DESCRIPTION

- Work remotely, must have a computer and internet access
- 8 week internship, to begin after April 1 and conclude before July 15, 2011
- 5-10 hours per week, flexible days and time

In lieu of monetary compensation, intern will receive:

- All expenses paid trip to attend the **2012 FPA NCA Winter Symposium** ($650 value)
  - Includes registration fee; meals; one night hotel accommodations (standard room); and up to $250 out-of-pocket travel expenses
- Paid one-year **Full-Time Student FPA® membership** ($35 value)

DUTIES

- Collaborate using a cloud project management application
- Write confirmation letters to speakers
- Write internal and external communications outlined in the marketing plan
- Write guidelines for corporate partner – sponsors about exhibiting at event
- Identify industry media event calendar web sites and social media sites to post event
- Research allied professional chapters/councils in region to promote event

QUALIFICATIONS

- Candidate must be a full-time undergraduate student, enrolled in a CFP® Board-Registered Undergraduate Program
- Ideal candidate will have excellent writing, grammar, and communication skills
- Ideal candidate will have a strong desire to foster the value of financial planning and pursue a career in the financial planning industry

FPA NCA is a preeminent organization for financial planning professionals in the Washington, DC area including the District of Columbia, suburban Maryland and Northern Virginia. The FPA NCA provides a forum for education and career development for over 800 members while adhering to the highest ethical and professional standards. www.fpanca.org. Pease email your resume to Christine Parker, CFP®, chair of the FPA NCA 2012 Winter Symposium at cparker@pfadvisers.com. (4/2011)

ADMINISTRATIVE ASSISTANT OPENING

Company Overview:
Finigan Financial Services, LLC is an independent registered investment advisory and financial planning firm. We provide systematic, comprehensive financial planning and investment management services as well as access to traditional brokerage services.

Position Summary:
The Administrative Assistant will support a small sized company and perform basic office functions such as routing calls, filing, imaging, scheduling and confirming appointments, periodic mailings and account processing. The Administrative Assistant will also assist in computerized database updates, new account setup, and meeting preparation.

The position requires daily client contact and the incumbent must process incoming and outgoing correspondence and maintain the organization of client files, refunds, receipts, logs, etc. The position requires the individual to be resourceful, detail oriented and possess exceptional organizational skills. Individual should have outstanding Customer Service skills and the ability to correctly and efficiently prioritize, task, or resolve customer requests.

This is a full-time position requiring 40 hours per week.

Preferred:
- 1-2 years administrative experience in financial services field
- Working knowledge of Microsoft Office Suite, including Word, Excel and Outlook

To apply: Forward cover letter, resume, and salary requirements to Lanie@finigan.net or via fax: 703-749-8588.
4/2011

FURNITURE DONATIONS NEEDED!

Our Daily Bread is moving! Which is very exciting but presents a challenge.
We need to furnish our new office almost completely. (If you saw our current furniture, you would see why!)
Do you know of a company that is downsizing or looking to donate the following?

4 Cubicles for Open Area, 62”x62” each - 1 Reception Cube, approx. 96”x62”
2 Office Area Cubes, 62”X62” each or a little larger - 8 Workstations or call stations, 36”x30”
10 Small folding tables for Multipurpose Room, 2’x4’ each - 30 stackable Chairs
7 Shelves for Food Pantry, metal 24”w x 3’l x 80” tall - 7 rolling desk chairs
1 L-shaped desk and hutch - 1 6 person conference table

We are looking to transport furniture around May 1, 2011. Thanks for your help.

Lisa Whetzel - Lisa Whetzel [exdir@odbfairfax.org]
Executive Director
Our Daily Bread, Inc.
10777 Main Street, Suite 320, Fairfax, VA 22030, 703-273-8829, www.our-daily-bread.org

Joyce Brooks
703-536-8249
703-300-1868 Cell
poodlefans@gmail.com

Objective:
Detail-oriented, reliable candidate seeks a support position with a financial planning and services organization.

Education:
Completed the Executive Certificate in Financial Planning program at Georgetown University Center for Continuing and Professional Education September, 2008. Passed the CFP Certification Examination.

B.S. Business and Management, University of Maryland University College

Current Employment:
January, 2010 to Present: Practice Administrator for a Certified Financial Planner. Facilitate preparation, submission and completion of financial planning, investment and insurance paperwork. Provide client service, calendar management, appointment preparation and documentation of advisor-client interaction.

Prior Employment:
Assistant to Business Manager, Immanuel Christian School (part time), Springfield, Virginia. Assisted in payroll, accounts payable and receivable functions. Provided other general support to Business Manager. Utilized Word, Excel spreadsheets and have some experience with Peachtree accounting software.
Loan Officer, USDA. Developed lending regulations for community facilities in rural areas. Processed loans from application to approval for community facilities and rural telephone cooperatives and companies. Conducted borrower compliance visits.

Volunteer Experience:
Served as church treasurer for three years, administering an annual budget of $2,000,000.
Worked with the Development Office of Fork Union Military Academy, creating promotional items. (4/11)

FINANCIAL PLANNING SUPPORT ASSISTANT

Are you an established support professional looking for a new opportunity to apply your skills in a friendly and dynamic environment? Our goal is to educate and advise our clients as they navigate life's most challenging financial issues.

As a financial planning support assistant with a Reston, VA independent wealth management firm, your responsibilities will include: scheduling client meetings; preparing investment and insurance applications; reviewing client statements from multiple sources; inputting updated values into the appropriate planning software; conducting research; providing outstanding and personalized service to our valued clients; and preparing financial planning documentation.

The right candidate is capable of working as a team member of a highly efficient and quality-oriented firm to ensure compliance with exacting standards. The individual must be highly motivated and organized, committed to following systems, hard working, a practical thinker and able to see complex transactions through to successful completion over a period of time.

KNOWLEDGE/SKILLS/COMPETENCIES REQUIRED

- FINRA Series 7 and 63 securities registrations in good standing.
- Life and Health-licensed in VA, MD and DC.
- Two to three years of experience in the investment industry; experience working with National Financial Services (NFS) processes and forms is a plus.
- B.A. or B.S. in business; Registered Paraplanner designation a plus.
- Proven customer service experience and the ability to communicate effectively with people across all levels of the business.
- Proficiency with computer programs, including MS Office suite, ACCESS, Advent, Argus, Value Line, S&P, Forefield Advisor and Morningstar Workstation.
- Proficiency in MoneyGuidePro financial planning software.
- Strong attention to detail and sophisticated organizational skills, including physical resources (such as files, manuals, etc.) and computer-based resources (such as calendars, appointments, client contact records, images, etc.).
- Broad knowledge of risk management and investment products (stocks, bonds, mutual funds, annuities, life, disability, and long-term care insurance).
- A self-starter who can work independently and as part of a team.

We offer competitive compensation, bonus potential and a comprehensive benefits package. Salary negotiable depending on experience and industry registration.

Please send qualifications including current resume to jredpath@vistaws.com. (1/11)

CFP WANTED FOR ESTABLISHED FIRM

Financial Advisory Firm in business for 31 years is seeking to hire a CFP to join their firm. This job has salary and benefits. The firm is an SEC registered RIA and is also a Branch Office of Raymond James Financial Services. The location is Glen Echo, MD (2 miles from Washington, DC). If interested e-mail resumes to Janice@lawandassociates.com or FAX to 301-229-8504. (3/2011)

STUDY GROUPS RETURNING!

BEGINNER (PRACTICE MANGEMENT): This practice management concentration group is designed to cover best practice and operational topics. The mission of this study group is to help advisors and staff members to be effective, efficient and grow through systems and processes. Members should have one to five-years of financial advisory services. The group meets bi-monthly for two hours on a Friday. Please contact Bonnie J. Armstrong for additional information.

INTERMEDIATE (INVESTMENT PLANNING): This Intermediate Group is ideal for RIA and CFP® certificants. This group will focus on current and proposed rules, investment strategies, and important financial topics such as but not limited to retirement planning, estate planning in the ever evolving environment. They affect and effect advisors in servicing clients. The group will meet bi-monthly for two to three hours. A future meeting will be scheduled upon format of a core group. Please contact Bonnie J. Armstrong for additional information.

ADVANCED: This Advanced Group is ideal for CFP® certificants, financial advisory firm principals or key people of a financial planning firm, who have unique organziational challenges, in addition to an advisory rol to clients. Individuals should have a minimum of 10-years of experience in financial advisory services. The group meets quarterly for half a day. You may register by contacting Bonnie J. Armstrong for additional information.

CONTACT INFORMATION:

Bonnie J. Armstrong
Office Phone: (703) 378-2620
Cell Phone: (703) 819-8545
E-mail: Bonnie@StrongPracticeSolutions.com

KEEL POINT

Family Office Technical Associate

Keel Point, one of the nation's premier boutique and entrepreneurial Multiple Family Office and Private Wealth Management firms, seeks a Technical Associate to join our family office team. This is a unique opportunity with a dynamic advisory company. We are proud of our hands on, professional and expert service we provide to highly affluent domestic and international families.

The Technical Associate will work with the Technical Manager to provide back office support for the Family Office Wealth Advisors and Family Representatives. The Technical Associate will assist with various client reporting, tax planning, estate planning and general administrative items as needed.

The ideal candidate will have a Bachelors Degree and at least three years work experience, and will be highly professional, extremely organized, detail oriented and proficient in Microsoft Excel.

For a complete job description, please email edaniels@keelpoint.com Please include the job title in the subject line of your email. 2/2011

PLEASE SEND PEGGY YOUR JOB PLACEMENT ADS, OR YOUR JOB SEEKING ADS FOR OUR CLASSIFIED CONNECTION NEWSLETTER, PUBLISHED ON THE FIRST OF EACH MONTH!

WE HAVE HEARD POSITIVE SUCCESS STORIES FROM PEOPLE PLACING ADS IN THIS NEWSLETTER!

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