

# ARTICLES OF INCORPORATION

of

## THE FINANCIAL PLANNING ASSOCIATION OF THE NATIONAL CAPITAL AREA

The undersigned incorporator hereby forms a nonprofit association under the provisions of Chapter 10 of Title 13.1 of the Code of Virginia, and to that end sets forth the following:

### Article I Name

The name of the entity is The Financial Planning Association of the National Capital Area.

### Article II Purpose

The purpose of the Association is to serve the needs of its members and to establish the value of financial planning and the success of the financial planning profession. In furtherance of that purpose, the Association shall devote its efforts to develop programs and services which appeal to its members including but not limited to educational classes and seminars, regular Association meetings, local and state government affairs, public and/or charitable affairs, and represent, promote and sponsor activities, programs and services of the Financial Planning Association. In furtherance of such purposes, the Association shall have and may exercise all of the rights, powers, privileges, and immunities now or subsequently conferred upon such Associations organized under the laws of the Commonwealth of Virginia.

Notwithstanding any other provisions of these Articles, the Association shall not directly or indirectly carry on any activity which would prevent it from obtaining exemption from Federal income taxation as a corporation described in Section 501(c)(6) of the Code, or cause it to lose such exempt status. All the assets of the Association will be permanently dedicated to the exempt purposes of Section 501(c)(6) of the Code, and in the event of a dissolution the residual assets will be turned over to one or more organizations which themselves are exempt organizations described under Section 501(c)(6) of the Code or corresponding sections of any prior or future Internal Revenue Code, or the Federal, State, or local government for exclusive public purpose.

### Article III Term of Existence

The Association shall have a perpetual existence.

Article IV  
Members

The Association is to have members including but not limited to those who participate in or are affiliated with the financial planning profession. The Association shall have such categories of members whose rights and privileges are set forth in the Bylaws.

Article V  
Directors

The powers and engagement of the Association shall be vested in and exercised by a Board of Directors. The Board of Directors shall be composed of such numbers and members as the Association's members shall, on an annual basis, determine. The Board of Directors may make, alter and/or amend the Bylaws subject to the approval of the membership. The names and addresses of the initial directors are as follows:

Gary Altman, Esq.  
11300 Rockville Pike, Suite 605  
Rockville, Maryland 20852

Tracey Baker, CFP  
9679-C Main Street  
Fairfax, Virginia 22031

Stephan Cassaday, CFP  
8180 Greensboro Drive, Suite 1180  
McLean, Virginia 22102

Christine D'Amato, CFP  
6010 Executive Boulevard, Suite 900  
Rockville, Maryland 20852

Barry Glassman, CFP  
8180 Greensboro Drive, Ste. 1180  
McLean, Virginia 22102

Kim Natovitz, CLU  
7830 Old Georgetown Road, #125  
Bethesda, Maryland 22814

Michael Rebibo, CFP  
8401 Old Courthouse Road, Suite 320  
Vienna, Virginia 22182

Grace Toh, CFP  
1445 New York Avenue, N.W.  
Washington, D.C. 20005

Deborah Voso, CFP  
220 West Patrick Street  
Frederick, Maryland 21701

Maria Walsh, CFP  
2508 Pegasus Lane  
Reston, Virginia 20191

Article VI  
Officers

The Association shall have such officers as may from time to time be prescribed by the Bylaws. Their terms of office and the manner of their designation or selection shall be determined according to the Bylaws then in effect.


Article VII  
Registered Agent and Initial Registered Office

The name of the Association's Registered Agent is Stephan Cassaday, who is located in the County of Fairfax, and whose address is 8180 Greensboro Drive, Suite 1180, McLean, Virginia 22102. The address of the Association's Initial Registered Office is 8180 Greensboro Drive, Suite 1180, McLean, Virginia 22102, which is located in the County of Fairfax.

Article VIII  
Distributions

The Association does not contemplate the distribution of gains, profits, or dividends to its members, and is organized for non-profit purposes; no part of any net earnings or assets thereof shall inure to the benefit of any Directors or any other individual.

IN WITNESS WHEREOF, the incorporator has signed these Articles this 22<sup>ND</sup>  
day of May, 2000.

  
Paul Juergensen, CFP  
Association President  
Incorporator