FPA NCA
FINANCIAL PLANNING ASSOCIATION
NATIONAL CAPITAL AREA

CLASSIFIED CONNECTION

Volume 3, No. 8, August, 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!

POSITION OPENING

About us -

We are a successful fee-based financial planning and practice located in Annandale, VA. Our team is cohesive, collegial, flexible and professional. We strive to provide our clients with the best informed, thoughtful, intelligent advice while developing close, personal relationships with each of them. We aim to provide the highest level of customer service. A significant component of this service is our administrative support process.

About you –

You're an experienced administrative professional who is exceptionally well-organized, process- and detail-oriented but prides him/herself on relationships with colleagues and clients. You have very strong Microsoft Office skills. You love organizing things: paper, emails, calendars, projects and ideas. As a result, details rarely escape you. You must be a self-starter who is independent but is not afraid to ask for help or direction: you work well with direction but little supervision. You have the maturity and self-confidence to ask questions, take suggestions and "manage upwards". And in addition to all that, you love serving customers and people often comment on your warm and professional presence.

The Job Responsibilities –

- Provide exceptional service to our practice's clients
- Answer phones, greet clients, schedule appointments and manage calendars.
- Triage phone calls and incoming emails; determine best resources for quickest response.
- Prepare for Client Meetings and necessary follow up
- Prepare meeting summaries and financial recommendations for clients
- Create polished client correspondence and presentation materials using Word, Excel and PowerPoint and propriety programs.
- Providing instruction to clients for accessing various proprietary websites
- Maintain client data bases
- Coordinate client appreciation and community events
- Process investment and insurance applications and paperwork
- Office website development and updating
- Set appointments and manage meeting logistics

Excellent opportunity to learn about financial planning and investment strategies. If interested, there may be opportunities to help coordinate the development of financial plans, investment strategies and account management and maintenance.

Schedule can be part time to full time with flexible working hours. Successful candidate will be required to pass a drug screen and have the ability to be bonded. Local candidates only.

To apply-

We prefer industry experience in similar role and FINRA certification of Series 6 or 7 or ability to obtain. If you are a match please email your resume, cover letter (we'd love to see your communication skills) and salary history to: Lea.McCaw@LFG.com

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Securities offered through Lincoln Financial Advisors Corp., a broker-dealer (member SIPC). Investment advisory serviced offered through Lincoln Financial Advisors Corp or Sagemark Consulting, a division of Lincoln Financial Advisors Corp., a registered investment advisor. Insurance offered through Lincoln affiliates and other fine companies. CRN 201106-2056072 8/2011

WILLIAM D. FINCH
Alexandria, Virginia
(202) 329-7925 billydfinch@yahoo.com

PROFILE SUMMARY

Successful leader, manger and communicator, seeking to apply exceptional organizational, administrative, and interpersonal skills in the Financial Planning, Wealth Management, Asset Management fields.

- Currently creating and presenting financial planning education lessons to prepare students for the Certified Financial Planner™ exam.
- Passed the CFP® exam and earned an MBA in Financial Planning.
- Recent US Navy officer with extensive experience in various leadership and resource management positions with a proven record of success as recognized by pattern of increasing responsibilities and citations.

RELATED QUALIFICATIONS & EDUCATION

Instructor, California Institute of Finance, California Lutheran University
CFP® pre-exam course instructor & tutor, January 2011-present

MBA (Financial Planning)
California Lutheran University, July 2010

Candidate for Certified Financial Planner™
Passed CFP® exam, November 2009

US Navy Command Financial Counselor
Pacific Fleet Headquarters, April 2008 – July 2009

Certificate in Financial Planning
Georgetown University, December 2007

US Navy Financial Management sub-specialty
Navy and Joint Staff Headquarters, Pentagon, January 2003 - March 2008

BS Business Administration (Finance) - Minor in Economics
California State University, Sacramento, May 1989

PROFESSIONAL EXPERIENCE

Goal Oriented Educator

- Skilled in facilitating successful comprehension of financial planning topics.
- Develops and presents lessons to expand core knowledge into intuitive ability.
- Navy Instructor Pilot & check flight examiner.
- Organized and facilitated training lesson plans for one, to groups of over 200.

Superior Communicator and Interpersonal skills

- Effective and accountable in high-profile executive support positions requiring daily high-level communication.
- Developed and presented financial alternatives and recommendations to executive panels.
- Drafted executive correspondence with minimal input or revision.

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Innovative Leader, Manager, and Mentor

- Leads through respect, positive motivation, and mentorship.
- Managed Naval Aviation Director's $30B Program Objective Memorandum budget.
- Reinvigorated waning squadron maintenance effort by raising professionalism and implementing ambitious goals. "Stair-step" execution increased morale and doubled output.
- Validated operational concept and subsequently integrated results into theater contingency plan.

Sustained Drive for Excellence

- Consistent record of delivering extraordinary results as a visionary and strategic planner.
- Ceaseless desire to learn leads to sustained success, evidenced by selection for preferred positions, assignments, and awards.

Energetic drive also applies outside the professional and academic environment as marked by Eagle Scout award, competitive collegiate and masters rowing, and as finisher of marathons, triathlons, and biathlons. 8/2011

Boutique Fee-only Wealth Management Firm Seeking Financial Advisor with 3 – 5 years of hands-on experience including:

- preparing and presenting financial plans,
- monitoring and rebalancing client portfolios,
- new account processing, cashiering and trading activities.

Don't apply unless you are interested in becoming part of an energetic and supportive team of women, and you desire an opportunity for personal career growth. We are looking for someone with the skills and experience to immediately assume responsibility for monitoring our existing HNW client's accounts and providing day to day service support for them. You will be expected to hire and train your own assistant planner while also supporting our senior advisors.

Requirements:
Position requires a bachelor's degree and CFP designation plus 3 to 5 years experience in a similar capacity. Candidate must demonstrate: a high degree of personal integrity; strong verbal and written communication skills; interpersonal skills to effectively deal with all types of people; a desire to learn; strong analytical and problem-solving skills; and an ability to effectively work as a team member.

This position does not require that you bring assets with you, nor will it require any business development activities on your part. This is a full-time position located in Middleburg, Virginia.

Salary: $55,000 - $70,000, based upon experience.
Contact: middleburg.investments@gmail.com 8/2011

INTERNSHIP POSITION ANNOUNCED!

Category: Financial Planning
Job: Internship
Egan, Berger and Weiner, LLC, a financial services firm in Tysons Corner, VA is offering a paid internship position.

This job would be to assist firm in client and business processing.
Candidate should be skilled at Word, Excel, database management i.e. MS Access, ACT, Goldmine. Interest in a career in the financial planning field is a plus. Future career opportunities available - flexible hours.

Contact: Bryan 703-506-0843
Fax resume to 703-506-0576 Email: bbeatty@ebwllc.com 6/11

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)

SEARCHING FOR CPA

May & Barnhard, PC, a growing CPA, tax, financial planning and divorce litigation support firm in Bethesda, MD is looking for a CPA for individual tax, divorce-related tax and financial planning (fee only) position. CFP a plus (will sponsor), minimum 5+ years experience (public accounting or substantial individual tax), full time, flexible hours, competitive compensation and benefits package, including parking, 401(k), profit sharing plan and individual health insurance, etc.

Please email your resume and cover letter to dmay@may-barnhard.com and czagorski@may-barnhard.com. 5/11

WEST FINANCIAL SERVICES JOB DESCRIPTION

TITLE: Portfolio Manager **REPORTS TO:** Director of Portfolio Management

GENERAL SUMMARY:

The Portfolio Manager is responsible for actively managing a client portfolio using mutual funds, individual securities or a combination of both, and monitoring the performance of client accounts.

MAJOR JOB ACCOUNTABILITIES:

1. **Investment Policy:**
   Participates in the development of short and long-term investment policies and strategies based on management investment philosophy and client investment objectives. Participates in Investment Committee meetings and decisions as well as contributes to Daily Strategy meetings. Performs a periodic review of team client accounts to monitor performance, maturing securities, cash balances, and rebalancing to target allocations.

2. **Portfolio Management:**
   With the Director of Portfolio Management or Team Leader, determines the investment strategy to be outlined in the Investment Policy Guideline for each account; implements the investment strategy; monitors the accounts to ensure the asset allocation is maintained within the parameters set forth; monitors portfolio performance and recognizes gains and losses; assists in ongoing portfolio communication; submits portfolio changes to trader; and prepares for and conducts periodic investment reviews with clients.

3. **Business Development:**
   Cultivates and maintains relationships with numerous sources of new business, including company officials, attorneys, accountants, and other centers of influence. Meets with prospects to explain company services. Prepares and delivers proposals to prospective clients.

4. **Market Research:**
   Keeps informed of developments in the security markets; follows specific company news and industry sector trends; uses fundamental and/or technical research to arrive at sound and timely investment decisions. Performs security research as directed by the Director of Equity Research or per client request.

KNOWLEDGE, SKILLS, AND ABILITIES:

1. Position requires a bachelor degree or higher in finance or related field and a thorough knowledge of U.S. Treasuries, agencies, municipal bonds, stocks, and mutual funds. Also requires a progression towards a CFP®, CFA, CPA or similar designation with strong industry experience. A minimum of three years work related experience is required, including experience in equity investments and asset allocation principles.

2. Work requires regular internal and external contacts to carry out the company's policies and programs.

3. Ability to effectively express ideas orally and in writing, prepare business correspondence, summarize complex reports, write procedures, and interpret complicated policies. Also involves making verbal presentations and recommendations.

4. High level problem-solving skills are required; problems are technically complex and require the collection, interpretation, and analysis of data from diverse sources.

5. Excellent computer skills including Excel, Word, and PowerPoint. Experience with Morningstar, Advisor Workstation and Axys a plus. (5/11)

FINANCIAL PLANNING ASSISTANT

Are you an established financial services 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 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 five 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 or CFP® 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. 7/11

Family Office Client Services - Family Representative

Keel Point, one of the nation's premier boutique and entrepreneurial Multiple Family Office and Private Wealth Management firms, seeks a Family Representative to join our family office team. This is a unique opportunity with a dynamic advisory company serving highly affluent domestic and international families. We offer advisory and wealth planning services including tax and estate planning, financial planning, philanthropic planning, family coaching, risk management, lifestyle management and investment management.

The Family Representative is the first line of contact for the client families. The Family Representative acts as the project manager coordinating with the technical and investment teams to ensure effective, excellent client service.
The ideal candidate will have excellent relationship skills and dedication to delivering first rate client service in a timely fashion. Candidate must be able to multitask and manage the timeline of several projects. A college degree is a prerequisite. Several years of experience in the financial or related field with client contact would be a plus. Candidate should be interested and/or in process of attaining CFP® certification.

For a complete job description, please email mboysen@keelpoint.com Please include the job title in the subject line of your email. 7/11

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 role 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

Julian H. Johnson
jjohn06@vt.edu | (757) 282-8823
304 Old Cedarfield Drive
Blacksburg, VA 24060
103 Westover Ave #206
Norfolk, VA 23507

Objective

To obtain a job with a financial planning firm that focuses on helping individuals secure financial independence and create a plan for the future. Professional skills include dedication, leadership, an excellent work ethic, and superb people skills. Proficient with Microsoft Office. Excels in any environment.

Education

Virginia Polytechnic Institute and State University, Blacksburg, VA, *May 2010*
B.S., Agricultural & Applied Economics, GPA 3.08/4.00
Option: Financial Planning, A CFP Board of Standards-Registered Program
Dean's List – *Spring 2007, Spring 2008, Spring 2009, Spring 2010*
NASAA Series 65: Uniform Investment Adviser Law Examination, *November 2010*

Professional Experience

Associate Planner-SFG Wealth Planning Services, Inc., Doylestown, PA *June 2010 - February 2011*

- Conducted quarterly reviews of mutual funds/money managers/investment products
- Conducted quarterly reviews of model portfolios
- Familiar with the process of writing comprehensive financial plans for new clients
- Monitored and updated information for ongoing planning and asset management clients
- Gained experience with IAS software
- Assisted with marketing initiatives

Intern-Virginia Retirement Specialist, Blacksburg, VA, *May 2009-August 2009*

- Gained experience with Morning Life Value and Red Star retirement planning software
- Gained insightful knowledge of retirement planning process

Intern-Cardiology & Arrhythmia Consultants, Inc., Norfolk, VA *May 2008-Dec. 2008*

- Generated monthly reports using innovative techniques in Microsoft Excel and Business Objects

Professional Awards

Financial Planning Association Diversity Scholarship Award Winner, *September 2010*

- Demonstrated professionalism and an ability to serve unique and diverse client populations
- Scholarship defrayed all costs to attend the Financial Planning Association Annual Conference in Denver and a free annual membership

Activities

Member of the Women's Varsity Soccer Team, *August 2006 – May 2010*

- 2006-2010:Named to the All ACC Academic Team
- 2009:Team Captain
- 2007:Named to the VA SID (Sports Information Directors) Second Team 2007
- 2006: Named Freshman of the Year; Named to the All Atlantic Coast Conference (ACC) Freshman Team
- 2006: Led the ACC in Assists; 3rd in the Nation in Assists

Member of Alpha Kappa Alpha Sorority, Incorporated, *November2008-Present*

- Nominating Committee, Chair
- Financial Committee
- Participated in the Big Event, Relay for Life, and the Food Drive
- Led a fundraiser for Haiti
- Presented the movie "Half the Sky Live" for Women's Awareness Week

Senior Vice President of the Financial Management Association, *January 2010-June 2010*

- Assisted financial planners that came on campus
- Led meetings and contributed innovative ideas

Member of the Financial Planning Association, *September 2010-Present*

- Attend meetings to stay current with financial planning topics

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Community Involvement

Volunteer, Margret Beeks Elementary School, *January 2006 – May 2010*
- Worked on various projects to encourage the children to play sports while focusing on academic achievement

Volunteer, Special Olympics, *Winter 2006-2009*
- Encouraged participants in their athletic endeavors

Member of Athletes In Action: Christian Fellowship of Collegiate Athletes *September 2006-Present*
- Learn to apply spiritual principles to sports and life
- Help others experience God's glory
- Attended The Ultimate Training Camp
  - Worked with female inmates in Boulder, Colorado *Summer 2007*
  - Cleaned up Winsor, Colorado after a tornado struck the area *Summer 2008*

Volunteer, Financial Planning Pro-Bono Committee *November 2010 – Present*
Participates in initiatives aimed towards helping underserved populations 7/11

Lincoln Financial Advisors/Sagemark Consulting

A Leading Full Service National Financial Planning Firm
Is looking to hire several
PAID SUMMER INTERNS
(possible school year opportunities as well) 10 – 40 Hours/ week

Duties may include:
- Prepare for Client Meetings and necessary follow up
- Research for marketing and/or client financial matters
- Prepare investment research and recommendation presentations, including investment policy statements
- Learn the Why and How of investment rebalancing; track investment performance
- Prepare meeting summaries and financial recommendations for clients
- Attend client, team, wholesaler or committee meetings
- Track investment and insurance submissions
- Office Administrative support – phones; filing; scanning; etc.
- Office website development and updating

The successful candidate has:
- Interest in Financial Planning/Investments/Insurance
- Strong written and oral communication skills
- Willingness to learn the business world
- Professional appearance and demeanor
- High personal integrity and discretion
- At least intermediate proficiency with MS Office programs
- Ability to quickly learn new software applications
- Ability to work independently but will ask for help when unsure
- Client centric attitude: "Serve First, Last and Always"

If interested contact: Ms. Sarangi Bhatia, Business Operations Manager
Lincoln Financial Advisors/Sagemark Consulting
8219 Leesburg Pike, Suite 200, Vienna, VA 22182
703-287-1562 - Sarangi.Bhatia@LFG.com 6/11

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