



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!

David William Nash
2196 Whisperwood Glen Lane, Reston, Virginia 20191
davenash3@comcast.net - (703) 264-9760

Summary CFP® Exam passed; CFA® Candidate; transitioning from teaching background; 15+ years experience analyzing, planning, facilitating; seasoned advisor with ability to assess, define benchmarks and implement dynamic programs and methodologies for achieving optimum performance. In-depth understanding of macro- and microeconomics.

Key Strengths and Skills

- Creative and analytical thinking
- Problem solving abilities
- Outstanding interpersonal and communication skills
- Relationship building
- Quick Learner
- Individual and organizational performance assessment
- Program and project management
- Excellent presentation abilities

Accomplishments

INDIVIDUAL & GROUP TRAINING
Developed and implemented multi-year personal training programs for private students enrolled in top ranked, highly-competitive music programs in northern Virginia high schools. Training regimen included skill building, goal setting, motivation, time management, application of customized exercises for mental and physical preparation for auditions and solo performance.

- Results: Students successfully completed their individual training programs leading to exemplary auditions followed by admission and scholarships to The Juilliard School of Music, New England Conservatory of Music and Northwestern University School of Music.
- Results: Students received top placements in regional and national solo competitions, Virginia All State Band and Orchestra and the American Youth Philharmonic Orchestras

PROCESS IMPROVEMENT
Established scalable and repeatable processes for training musicians of all skill levels during summer music camps. Mediated individual and group needs with organizational directors in order to gain consensus on training process, streamline the delivery of the curriculum and ensure desired outcomes.

- Results: Training, consultation and counseling for music programs for Fairfax County Band Programs.
- Results: Training process improvements have been adopted by organization directors in multiple counties in northern Virginia, substantially elevating caliber of student musicians, increasing the quality of state-funded music programs and increasing the percentage of students who successfully pursue graduate studies in music.

LEADERSHIP
Organize, market, and lead both amateur and professional performance groups.

- Results: Groups have developed a reputation for excellence in venues across metropolitan Washington, DC, and Baltimore.

Employment History Self Employed 1995 to present

- Private Teaching & Performance
- Group Instruction: Brass Specialties, Some Composing and Arranging
- Performing: Classical, Jazz and Contemporary Music.

Education Training & Associations

CFP® Exam passed: March 2010
CFP® education: Boston Institute of Finance, Boston University December 2009
Financial Planning Association/National Capital Area: Mentorship program, committee volunteer
CFA® Candidate
Familiar with Microsoft Word & Excel, Money Guide Pro

B.S., George Mason University, Fairfax, Virginia
Received private instruction from:

- Joseph Alessi, Principal, New York Philharmonic and Master Recording Artist and Teacher, Juilliard School of Music
- Milton Stevens, Principal (deceased), National Symphony Orchestra and Conductor, Washington Symphonic Brass
- Per Brevig, Principal (retired), New York Metropolitan Opera (11/2010)

ERIC J. FIALA

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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)

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)

ADMINISTRATIVE ASSISTANT NEEDED

Financial Planning and investment firm in Fairfax VA is seeking an Administrative Assistant/Planning assistant with experience in the Financial Planning field. Securities, Life, and Health licenses helpful, but not required. Our ideal candidate is an individual who has excellent written and verbal communication skills, is organized and able to manage competing priorities, who is proficient with the entire Microsoft Office Suite, and attention to detail is a must. This position is a support position to several Financial Planners in the firm and will include assisting in client case prep, running financial plans, speaking with clients, management of financial planning software, and other tasks associated with supporting our clients. Please fax your resume to Debbie at 703-764-9560 or e-mail to delardid@cjmltd.com

11/2010

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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