FPA NCA
FINANCIAL PLANNING ASSOCIATION
NATIONAL CAPITAL AREA

CLASSIFIED CONNECTION

Volume 4, No. 2, February, 2012
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!

Hiring Experienced FINANCIAL ADVISORS

MANNA Capital Management - Washington D.C. Metro Area

Job Description

We are an established Wealth Management firm and are looking to expand our investment team in Falls Church, VA. We are seeking an experienced Financial Advisor. Our firm is an independent Broker/Dealer dating back to 1962.

All qualified candidates should email a word version of their resume to the contact information provided. The position requires a person who is highly motivated and detail oriented.

Job Responsibilities:

• Draft investment proposals for prospective clients. This includes commenting on their existing holdings and effectively communicating how our investment strategies will enhance their portfolio.
• Complete various financial planning projects for current clients (i.e. retirement projections, college funding, estate planning, etc.) Via Financial Planning Software.
• Engage in Networking events weekly (Chamber of Commerce etc)
• Develop full use of CRM & update client files and maintain client database (salesforce.com) and coordinate Marketing campaigns for prospects and clients
• Quarterly Workshops and or Seminars and other special client events for Lead Generation
• Reach out to old clients whom have not been contacted in years and rekindle the relationship

Desired Skills & Experience

Ideal Candidate Skills/Characteristics:

• Must demonstrate ability to bring in New Clients
• Must have understanding of the markets
• MUST hold FINRA Series 7 license. State approved health and life insurance licenses highly desirable.
• Excellent command of the written English language is NECESSARY.
• Personal interest in investing is a PLUS.
• 2-4 years relevant job experience.
• Working knowledge of Microsoft Office and related business productivity tools.
• Ability to manage competing priorities in a timely fashion.
• Mental acuity to work independently, but also function in a team environment when the situation dictates.
• Strong attention to detail and systematic follow thru with Prospects and Clients
• Ability to communicate information in a clear, concise, and professional manner.

Company Description

To learn more please visit: www.MANNACapitalManagement.com

Additional Information

Type:	Full-time
Experience:	Associate
Functions:	Customer Service, Sales, Business Development
Industries:	Investment Management
Compensation:	Draw $55,000 + Commission for first 24 months

11/2011

WEALTH MANAGER POSITION – COLUMBIA, MD

Pinnacle Advisory Group is one of the nation's leading independent wealth management firms, offering fee-based asset management and comprehensive financial planning to affluent clients. Over the past twenty years, we've earned a reputation for top decile investment performance and are recognized leaders in active portfolio management. As a result of our white glove service and exceptional performance, we have a client retention rate of over 98%.

We are looking for an experienced wealth manager to join our team and continue our tradition of excellence.

Position Responsibilities

Manage and provide comprehensive financial planning to an assigned book of affluent clients. Establish relationships with them quickly, ensuring a smooth transition to your new role as their advisor;

Function as the communications liaison between our full time investment team and clients, providing detailed explanations of portfolio management decisions and related performance information;

Help achieve the yearly goals of the firm by expanding the client book and providing energetic business development;

Work with our marketing department to brand both Pinnacle and your own services.

Position Requirements

A minimum of five years experience as a practicing Certified Financial Planner (CFP®), providing comprehensive planning to the affluent market;

Established track record of business development;

Excellent communication abilities, both written and verbal;

Strong computer skills, including experience with financial planning, CRM, and portfolio management software (Money Guide Pro and Portfolio Center expertise is a plus);

Bachelor's degree;

Availability to work out of our Columbia, Maryland headquarters.

Pinnacle Advisory Group does not discriminate in employment based on race, religion, gender, national origin, disability, age, sexual orientation, or any other criteria prohibited under controlling federal, state or local law.

Please e-mail cover letter and resume to John Hill @ careers@pinnacleadvisory.com
No phone calls please.

Vienna VA Financial Planning Firm Seeks Entry Level Para-Planner

- Candidate must be detail oriented, able to multi task, with excellent communication and organization skills.
- Experience in banking/securities/financial planning a plus.
- Must be proficient in MS Office.
- Initial duties include answering phones, setting appointments, account opening and transfers, opening mail, scanning, maintain firm's corporate logs and greeting clients. Prior experience preferred.
- Long term goals to help senior partner manage individual clients and assist with firm operations. Potential to become Certified Financial Planner.
- Please send resume to rprice@brucevaughn.com or fax to 703-356-0097. 1/2012

NOW HIRING CREDENTIALED PROFESSIONAL

Kendall Capital Management, a high net worth fee-based investment advisory firm located in Rockville, MD, is ready to hire an experienced HNW portfolio manager/client relations professional. We are a small, well-funded and stable firm. All of the staff who started the firm in 2005 remain with us today.

Our next hire will be a credentialed (CFP® CFA, CPA, and/or MBA) HNW-focused investment professional with over ten years' experience in the capital markets and a loyal client base. We offer a comfortable, team-based working environment, highly accomplished coworkers, superior marketing support, fully-paid medical for employees, profit sharing and paid parking.

If you meet or exceed the above requirements and want to learn more about us, please contact the principal, Clark Kendall, CFA, AEP, CFP® at 301-838-9110 or email to ckendall@kendallcapital.com. All inquiries will be held in the strictest confidence. 1/2012

FINANCIAL PLANNING POSITION - ENTRY LEVEL

MAY & BARNHARD, PC, A GROWING CPA, FINANCIAL PLANNING AND DIVORCE LITIGATION SUPPORT FIRM IN BETHESDA, MD, IS SEEKING A COLLEGE GRADUATE (FINANCIAL PLANNING, ACCOUNTING, BUSINESS, PRE-LAW, OR FINANCE) TO ASSIST OUR FINANCIAL PLANNING AND DIVORCE LITIGATION DEPARTMENTS IN FINANCIAL AND TAX PROJECTIONS, FINANCIAL AND INVESTMENT ANALYSIS AND CLIENT COMMUNICATIONS. RESPONSIBILITIES ALSO INCLUDE SOME EXECUTIVE ASSISTANT DUTIES.

ON THE JOB TRAINING PROVIDED. CFP CANDIDATE A PLUS (WILL SPONSOR). STRONG COMPUTER AND COMMUNICATION SKILLS NEEDED.

EXCELLENT BENEFITS AND GROWTH POTENTIAL. FULL TIME POSITION WITH FLEXIBLE HOURS. 1/2012

EMAIL RESUME TO DMAY@MAY-BARNHARD.COM AND JOCHSMAN@MAY-BARNHARD.COM

Thomas M Formhals

13133 Rounding Run Circle
Oak Hill, Virginia 20171
703.623.6018 cell

Summary

Looking to join a Financial Advisory firm in a second career as an advisor/planner assisting your senior advisors achieve superior client satisfaction. **Successfully passed the CFP exam and obtained Series 7 and 66 licenses.** Self motivated with excellent problem solving ability. Excellent listening and communication skills with individuals and groups. Naturally client oriented, enthusiastic, self managing.

Skill Sets

- Candidate for CFP certification (acquiring experience requirement). Series 7 and 66 licenses, Virginia insurance Producer / Consultant.
- Proficient with Money Guide Pro for the purpose of creating client financial plans. Knowledgeable in the use of Morningstar Principia for investment research and portfolio analysis. Effective in the application of Excel spreadsheets to evaluate, summarize, and report financial information.
- Strong communication skills in presenting ideas to the client and consulting to achieve a successful plan. Skills include creation of client proposals, presentations to the client, incorporate feedback and adjust plan. Disciplined to implement and monitor the financial plan, maintain relationships throughout client's lifetime to ensure satisfaction, and uncover new opportunities to address client's needs.

Work Experience

Capital Planning & Investments, Fairfax, VA ***2010-present***
Financial Advisor/Registered Representative
Investment Advisory Representative with Capital Planning & Investments, Inc., and a Registered Representative for Triad Advisors. I provide investment and financial advice for individuals and small business. Responsible for building own book of business, all investment advice and selections, trades, client meetings and client reports. I have Series 7 and 66 licenses, Virginia insurance Producer/Contractor for health, life, annuity, and long term care.

Information Technology Experience ***1974-2009***
Successful career in Business Development, Sales, and Marketing positions with leading computer manufacturers spanning multiple evolutions of technology and architecture.

- Sun Microsystems, McLean, VA 1999 - 2009
- Cray Research/Silicon Graphics, Calverton, MD 1991–1999
- Apollo Computers/Hewlett Packard, McLean, VA 1986–1990
- Prime Computer, Rockville, MD 1980–1985
- Burroughs Corporation, McLean, VA 1974-1979

Personal

Member, Financial Planning Association
Linkedin profile: http://www.linkedin.com/in/tomformhals

Having trouble finding … Office Assistants?
Administrative Assistance?
Management?
Customer Service Representatives?
College Interns?

Let ROCS (Responsible Outgoing College Students) help you fill those jobs!
Why ROCS?

- **We provide great students** who are eager to learn, energetic, and technically savvy that can't be found through traditional agencies.
- **We're affordable** for any sized company and all of our services are priced at simple flat rates.
- **We take care of all payroll hassles** including taxes, workers comp, liability, insurance, and payroll processing so you can focus on your business.
- **We have students in all fields** including administrative, customer service, accounting, marketing, and more!
- **We rigorously screen and interview** our students before and after we meet with you to ensure you get a qualified candidate for the position.

ROCS is a staffing services company that helps college students and recent grads find part and full-time job opportunities that match their future career fields and goals. For more information, contact Leah @ (703) 579-6677 1/2012

TAXATION INTERVIEW PROGRAM
Interview & Hire Graduate Tax Students

Georgetown University Law Center is again partnering with New York University School of Law to sponsor this year's Taxation Interview Program (TIP). TIP enables private and public sector employers to interview, on one day **(March 2, 2012)** and in one place **(Embassy Suites Hotel, Washington, D.C.)**, current LL.M. in Taxation students from Georgetown Law and NYU Law. Since 2001, TIP has been the nation's flagship program for the recruitment of graduate tax students, featuring employer schedules representing law firms, government agencies, corporations and the major accounting firms from around the country. Employers can pre-screen candidates for interviews, and they can also participate in TIP through a resume collection option.

Georgetown Law cordially invites you and your organization to participate in TIP 2012. If you are not involved in hiring at your organization, please feel free to pass this message along. For further information about TIP, please visit the TIP website. **Employer registration is available online and will remain open until January 27, 2012**.
TIP website: http://www.law.georgetown.edu/graduate/TIP.html

Deborah Latimer
7025 Enterprise Ave.
McLean, VA. 22101
(703) 801-9455
debbieltmr@aol.com

Spire Investment Partners **McLean, Virginia** **2011**

Executive Assistant

- Function as point of contact for busy financial advisor, arrange calendar, screen calls, schedule meetings and manage steady flow of client requests.
- Understand organizational flow of industry and respond to technical queries.
- Process new accounts and related maintenance functions at *Fidelity, NFS* and *Schwab* platforms.
- Generate portfolio reviews in *Morningstar* and *Albridge* account management systems.
- Process client disbursement requests, including electronic transfers, wires, journals and checks.
- Process alternative investment materials at *Atlas Resources* and *Cole Real Estate* companies.
- Operate *Redtail Client Relationship Management System*.

American Association of Colleges of Nursing **Washington, D.C.** **2003--2009**

Gerontology Project Manager

- Managed two multi-million dollar gerontological nursing education grants.
- Co-authored a final project monograph, wrote narratives for association's web site.
- Synthesized material from a variety of sources, wrote detailed bi-annual report summaries.
- Planned three scholar leadership conferences: led discussions/panels, organized interactive activities.
- Headed $500,000 minority nurse faculty scholarship program.
- Recruited application review panel members and mediated discussions to determine scholarship awardees.

Brain Injury Services, Inc. **Springfield, Virginia** **1989--2003**

Case Manager and Community Outreach Specialist

- Designed case management system for start-up non-profit.
- Chaired monthly client review board meetings.
- Wrote persuasive letters petitioning local governments for services.
- Generated written outlines for outreach presentations and professional education seminars.
- Negotiated social service maze to work for Northern Virginia brain injury survivors.
- Provided oversight to junior staff members.

EDUCATION Master of Social Work Washington University St. Louis, MO

References are available upon request. *12/2011*

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 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

Grant Writer/Manager

Our Daily Bread, Inc. is looking for a bright individual interested in a local non-profit as a **Grants Manager**. They must be highly organized, have strong interpersonal skills, attention to detail, and be able to work independently from home. Must have home access to internet, phone and own transportation. Must have proficiency in MS Word, Excel, and the Internet. While this is a year around part-time position the hours fluctuate with grant due dates. Hours average 10 hours/week but sometimes requires up to 30 hours/week. BS or BA required. $17/hr to start. Please send resume, 3 page writing sample, and a cover letter to Our Daily Bread, exdir@ODBfairfax.org. Deadline **February 9, 2012.** ODB is an Equal Employment Opportunity Employer.

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