



## 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 20<sup>th</sup> 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](http://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 20<sup>th</sup> 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 20<sup>th</sup> 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](mailto:PeggyNelson8@verizon.net). Thank you!

**Mahak Nagpal**  
mn6ca@virginia.edu  
USA Cell 1-980-226-7780

<b>EDUCATION</b>	<b>University of Virginia</b> , Charlottesville, VA, USA. Batch: May 2013 Major: Economics and Psychology <b>The International School Bangalore</b> , May 2009 <b>Methodist Girls' School</b> , Singapore, April 2005	
<b>EXPERIENCE</b>	<b>Hongkong &amp; Shanghai Banking Corporation (HSBC)</b> <a href="http://www.hsbc.com">http://www.hsbc.com</a> Intern, LS Pasupathi's Office (Private Banking), Bangalore, India	Summer 2010
	<b>Hongkong &amp; Shanghai Banking Corporation (HSBC)</b> <a href="http://www.hsbc.com">http://www.hsbc.com</a> Intern, Colin D'Souza's Office (Premier Banking), Bangalore, India	Summer 2010
	<b>Kotak Wealth Management</b> Bangalore, India <a href="http://www.wealthmanagement.kotak.com/">http://www.wealthmanagement.kotak.com/</a> Intern, Shinil Chenchery's Office, Bangalore	Summer 2008
	<b>ReadiMinds</b> Bangalore, India <a href="http://www.ReadiMinds.com/main.htm">http://www.ReadiMinds.com/main.htm</a> [Online Security Software Company] Intern, Human Resources Department	Summer 2007
<b>AWARDS</b>	<b>UVA Office of the Dean of Students'</b> Blueprint Emerging Leaders' Program [Award]  <b>Hongkong &amp; Shanghai Banking Corporation (HSBC)</b> Recognition of Outstanding Contribution by an Intern.	
<b>LEADERSHIP</b>	<b>University of Virginia Singapore Students' Association</b> Treasurer Manage a budget of USD 2000	April 2010–Present
	<b>University of Virginia Students' United for Business (SUB)</b> Project Manager Create and manage various business-related events intended for the larger University community.	September 2010-Present
	<b>University of Virginia Madison House</b> Charlottesville, VA Site Leader, Cavaliers Care Programme	
<b>ACTIVITIES</b>	<b>Volunteers with International Students and Scholars, and Staff Program (VISAS)</b> <a href="http://www.virginia.edu/provost/caelc/volunteer.html">http://www.virginia.edu/provost/caelc/volunteer.html</a> Classroom Consultant	
	<b>National Survival Swimming Award, Singapore Sports Council</b> Silver and Bronze	
<b>LANGUAGE SKILLS</b>	Classroom training in Hindi from Grade 1 through Grade 12; Currently being trained in Mandarin (Chinese).	(5/11)

## ***Job Summary***

### **Deputy Director for Financial Education**

Salary: Open

Location: Alexandria, VA

Employer: Military Officers Association of America      Type: Full Time – Senior Level

Categories: Education, Training, Library, Finance, Economics, Banking

Preferred Education: Masters

#### ***Employer Information***

##### **About [Military Officers Association of America \(MOAA\)](#)**

The Military Officers Association of America (MOAA), the world's largest association for military officers is looking for a Deputy Director, Financial Education. This position provides education to our members on a variety of financial products and how to enhance their military benefits. This is not a sales position, but an educational position. Candidates must be knowledgeable in the areas of insurance, income tax planning, investment planning, retirement planning, estate planning, and education funding and employee benefits. Prepares and presents high impact briefings that communicate the need for unbiased financial education and advice to decision makers in the active duty, reserve and National Guard components. Write financial articles for the *Military Officers Magazine* and a variety of electronic media. Visit [www.moaa.org](http://www.moaa.org) MOAA is a non-profit with exceptional benefits and work life balance.

**NOTES:**      Additional Salary Information: No relocation provided

#### ***Requirements***

Certified Financial Planner™ or equivalent financial certification ◦ Prior military experience ◦ Superior communications and interpersonal skills

◦ Willingness to travel domestically approximately 40% of the time

#### ***How to Apply***

Send resumes and cover letter to [resumes@moaa.org](mailto:resumes@moaa.org)

Only candidates that demonstrate relevant financial education and experience will be contacted.

6/2011

## 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.

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### DESCRIPTION

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- 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

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- 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

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- 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](http://www.fpanca.org). Please email your resume to Christine Parker, CFP®, chair of the FPA NCA 2012 Winter Symposium at [cparker@pfadvisers.com](mailto: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](mailto:Lanie@finigan.net) or via fax: 703-749-8588.  
4/2011

## 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](mailto:bbeatty@ebwllc.com)

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## Joyce Brooks

703-536-8249

703-300-1868 Cell

[poodlefans@gmail.com](mailto: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)

## 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](mailto:dmay@may-barnhard.com) and [czagorski@may-barnhard.com](mailto:czagorski@may-barnhard.com). 5/11

## WEST FINANCIAL SERVICES JOB DESCRIPTION

**TITLE:** Portfolio Manager

**REPORTS TO:** Director of Portfolio Management

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### **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](mailto:jredpath@vistaws.com).

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## KEEL POINT



### 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](mailto:mboysen@keelpoint.com) Please include the job title in the subject line of your email.

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### STUDY GROUPS RETURNING!

**BEGINNER (PRACTICE MANAGEMENT):** 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 organizational 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](mailto: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; 3<sup>rd</sup> in the Nation in Assists

**Member of Alpha Kappa Alpha Sorority, Incorporated**, *November 2008-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

*Continued on next page*

Johnson – Continued from previous page

**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

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**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](mailto:Sarangi.Bhatia@LFG.com)

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