FPA NCA
FINANCIAL PLANNING ASSOCIATION
NATIONAL CAPITAL AREA

CLASSIFIED CONNECTION

Volume 3, No. 3, March, 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!

ERIC J. FIALA

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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)

CFP WANTED FOR ESTABLISHED FIRM

Financial Advisory Firm in business for 31 years is seeking to hire a CFP to join their firm. This job has salary and benefits. The firm is an SEC registered RIA and is also a Branch Office of Raymond James Financial Services. The location is Glen Echo, MD (2 miles from Washington, DC). If interested e-mail resumes to Janice@lawandassociates.com or FAX to 301-229-8504. (3/2011)

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 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
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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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