



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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8/2011

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

PROFILE SUMMARY

Successful leader, manager 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

Group Sales Consultant in Washington DC.

This position is responsible for the sales of 401K and 403b plans to small to midsize organizations. The requirements are an active FINRA series 6 and 63, past direct sales experience and ideally some retirement plan knowledge.

The position pays a base compensation of \$50,000. There is a bonus that is between 20% and 80% of the base compensation. The majority of the bonus is based on performance. Salary increases are at increments of \$5,000. There is also a company car and excellent benefits. This position is with a national organization that has never downsized and only promotes from within.

If there is any interest on your end or possibly by someone you know, please contact or send a resume to Alexis Aguilar at aaguilar@cps4jobs.com.

10/2011

Financial Planning Associate Needed!

Bernhardt Wealth Management, Inc., a Tysons Corner based fee-only wealth management firm, is seeking an experienced and committed Financial Planning Associate. We are looking for the right person to compliment our team and our clients.

Our firm offers comprehensive wealth management to high net worth individuals and families. With a base of high-end clients, an excellent reputation and rapid growth rate, we are a growing presence within the industry. Our work is dynamic and extremely challenging, and we offer a friendly, team environment with growth opportunity.

We are searching for an individual who is a highly motivated, hard working, team player with a willingness to help wherever needed. An ability to meet deadlines while multi-tasking and keeping up with a busy, demanding, client-oriented environment is a must. Position requires professional appearance and excellent verbal and written communication skills. Candidate must possess excellent organizational skills with a keen eye for detail and superior analytical capabilities, along with a “can-do” attitude. Candidate must also be willing to do non-financial planning tasks to help the firm move to the next level.

Job Purpose: Assist lead Advisors in preparing financial plans while maintaining client information, asset and trading databases. Assist in efficient office operations and provide a superior client service experience.

Education and Experience

- Minimum Education: Bachelor Degree, Certified Financial Planner (CFP®) designation or working on obtaining
- Have a minimum of three years of experience related to financial planning including some knowledge of insurance, retirement, investment, tax and estate planning
- Successful candidate should possess, or be willing to achieve in the near future, the Series 65 license
- An MBA, CPA, ChFC and/or PFS designation would be a bonus

Skills

- Have excellent computer skills, including Microsoft Office and the ability to learn new technologies
- Demonstrate excellent communication skills (oral and written) while maintaining cheerful and positive attitude
- Be detail oriented with strong analytical skills including an understanding of cost basis and performance reporting
- Ability to take ownership of work and achieve goals without close supervision
- Specific experience working with Junxure CRM, Morningstar Advisor Workstation, Schwab Portfolio Center, CEO Image Systems, TRX Rebalancing Software and/or Money Tree Financial Planning Software a plus

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Primary Responsibilities

- Prepare and update investment and financial plans for client and prospect meetings as well as coordination of follow up items
- Make proactive outbound service calls to clients as well as facilitate a limited number of client review meetings
- Update and maintain client portfolio information in Schwab Portfolio Center including reconciling daily investment data downloads
- Learn and understand our investment philosophy and methodology using the Dimensional Funds (DFA)
- Assist in updating and revising procedures manuals
- Maintain database and records in CRM software (Junxure) and document imaging software (CEO Image)
- Serve as a backup in answering telephone calls and operations activities
- Coordinate client communication through presentations, written materials, emails, etc
- Assist with portfolio management tasks including preparing client trades and generating cash for withdrawals by utilizing rebalancing software (Total Rebalancing Expert)
- Help coordinate follow up with outside partners in regards to insurances, taxes, and estate planning related issues
- Lead and participate on projects for process enhancements related to improving office operations

Personal Characteristics

- Highly professional: Should be comfortable interacting with clients. This person will be responsible for meeting with some clients alone or with the team.
- Highly detailed: Must be very organized, as he or she will administer the financial planning aspects of the firm.
- Technology adept: Knowledge of Microsoft Office and ability to learn various software packages and technology to assist in the preparation of reports and analyses.
- Growth: Must be looking to grow with a group.
- Time Management: Must be able to prioritize the variety of tasks to be performed. Must be able to work within deadlines.
- Attitude: Must have a positive and happy demeanor and must be able to work with different types of people.
- Friendly: Must be likeable and not be afraid to work with clients in face-to-face meetings or on the phone.

We offer a competitive salary, incentive program, and benefits package. To be considered, you must submit all of the following: Cover letter, resume, salary history, and answers to the five questions below in electronic form to Tim@BernhardtWealth.com.

- 1.What are the most important three things for which you are looking in your next position?
- 2.What are the three things you would want to avoid in your next position?
- 3.If you could create your "ideal" job, what types of opportunities, responsibilities and work environment would you build around your "ideal" job?
- 4.What are some of your key goals in the next two years, next five years and next ten years?
- 5.If you were me, what should I have asked you and why? (In other words, list your question and answer it.)

Submissions without the cover letter, resume, salary history and responses to the above questions will not be considered.

9/2011

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

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, *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

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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

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® certificant. 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® certificant, 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

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