## Our Corporate & Individual Contributors

(As of January 23, 2023)

### CORPORATE

<table>
<thead>
<tr>
<th>Contribution Range</th>
<th>Company Name</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$2,000,000 up</strong></td>
<td>Charles Schwab &amp; Co., Inc. &amp; Charles Schwab Foundation</td>
</tr>
<tr>
<td><strong>$1,500,000 – $1,999,999</strong></td>
<td>AIG Life &amp; Retirement, Fidelity Investments</td>
</tr>
<tr>
<td><strong>$1,000,000 - $1,499,999</strong></td>
<td>Allianz Group (Allianz Global Investors, Allianz Life Insurance Company), Ameriprise Financial, Inc., TD Ameritrade Institutional</td>
</tr>
<tr>
<td><strong>$500,000 - $999,999</strong></td>
<td>Capital Group/American Funds, Invesco, Pershing Wealth Solutions</td>
</tr>
<tr>
<td><strong>$350,000 - $499,999</strong></td>
<td>BlackRock, Lincoln Financial Group, LPL Financial, SEI Investments, Orion Advisor Solutions, LLC</td>
</tr>
<tr>
<td><strong>$250,000 - $349,999</strong></td>
<td>Cetera Financial Group, Commonwealth Financial Network, DWS Investments, Franklin Templeton Investments, Prudential Financial, Inc., T. Rowe Price Investment Services</td>
</tr>
<tr>
<td><strong>$200,000 - $249,999</strong></td>
<td>Dimensional Fund Advisors, Envestnet, Inc., Raymond James Financial Services</td>
</tr>
<tr>
<td><strong>$150,000 - $199,999</strong></td>
<td>The Cambridge Foundation, CNL Securities Corp.</td>
</tr>
<tr>
<td><strong>$100,000 - $149,999</strong></td>
<td>AssetMark, Bailey &amp; Glasser LLP, CAIS, Columbia Management Distributors, eMoney Advisor, E*TRADE Advisor Services, Focus Financial Partners, Goldman Sachs, MFS Investment Management, PENNYMAC, Pioneer Funds, Putnam Investments, Thornburg Investment Management, Wells Real Estate Funds</td>
</tr>
</tbody>
</table>

### RIA IMPACT PARTNERS

<table>
<thead>
<tr>
<th>Company Name</th>
</tr>
</thead>
</table>
INDIVIDUAL
(amounts include matching recognition)

$1,000,000 up
Armstrong, Fleming & Moore, Inc.
(Armstrong, Alexandra, CFP®; Fleming, Ryan, CFP® & Fleming, Betsy; Holubowich, Carl, CFP®; Moore, Mary, CFP®; Rivers, Christopher, CFP®)

$500,000 - $999,999
Coit, R. Ken
Kautt, Glenn G., MBA
Kochis, Tim, J.D., MBA, CFP®

$400,000 - $499,999
Maginn, Stephen & Linda

$200,000 - $399,999
Carter, Bill E., CFP®, ChFC®, CLU®
Kahan, Scott M., CFP®
Meritas Wealth Management
(Clarke, Gregg E. & Tiffani, CFP®; Gott, Kacy, CFP®)

Private Ocean
(Friedman, Greg, CFP®, MS)
Yeske Buie Inc.

$150,000 - $199,999
Bedel, Elaine, CFP®
Clark, Bernie
Clifford, Kevin G.

CJM Wealth Advisers, LTD
(Baker, Tracey A., CFP®; Brady, Claudia C., CFP®; Greene, David D., CFP®; Jones, Brian T., CFP®; Jones, Timothy W., CFP®; McLeod, Kim A., CFP®; Ness, Jessica R., CFP®)

Fodor, John
Quest Capital Management, Inc.
(Blessing, Kalita, CFP®, CAP; Durie, Marie H., CFP®, Kunhardt, Carl J., CFP®, CIMA®, AEP; Moore, Dennis J., CFP®, Young, E. Woody, CFP® & Young, Penny, CFP®, CPA)

Sharkey, Eileen M., CFP®
Silicon Valley Wealth Advisors
Welch, Stewart H, III, CFP®

$100,000 - $149,999
Accredited Investors Wealth Management
Aspiriant
Bachrach, William “Bill”
Brostrom, Ilene, CFP® & Kent
Carroll, Larry W., CFP®
Choronyk & Associates
Edelman Financial Engines
Edelman, Ric & Jean
Fox, Marjorie L., JD, CFP®

Freedman Financial
(Marc Freedman, CFP®)
Healy, Kate
Herrington, James W., CLU®, CFP® & Brenda
Jacques, Joseph W., CPA/PFS, CFP®, RFP®, ChFC®, CLU®
Jaffe, Martin, CFP®
Ruhlin, Peggy Miller, CFP®, CPA
(Retired)
Short, David W.
Stueve, Kay & James, CFP®, CIMA®, Tarbox, Laura A., CFP®

$75,000 - $99,999
Boone, Norman M., MBA, CFP®, & Lubitz Boone, Linda, CFP®
Canter, David E.
Ferrara, V. Raymond, CFP®, CSA
Jones, Peter D.
Katz, Deena, CFP® & Evensky, Harold, CFP®
Kurtz, Martin, CFP®, AIFA®
Moisand Fitzgerald Tamayo, LLC
(Moisand, Daniel B., CFP®, Fitzgerald, Charles E., CFP®, Tamayo, Ronald, CFP®, EA; Chandler, Derrick, CFP®)

Pinnacle Advisory Group
RTD Financial Advisors
(Diliberto, Roy T., CLU®, ChFC®, CFP®, Brecher, Alan, CFP®, PPC; Busillo, Richard; Hochschwender, John; Labadie, Marc; Weiand, Jeff)

Tarbox, Laura A., CFP®
VLP Financial Advisors
(Bruce Vaughn, CFP®, AIF®, Patricia Vaughn, Dan Lash, CFP®, AIF® & Rose Price, CFP®, AIF®)

$50,000 - $74,999
Camcik, John E.
CFP Board of Standards
The Deena Jo Heide-Diesslin Foundation
Dellinger, Kyn, EA, CFP®
Dimitroff, Marilyn Capelli, CFP®
Dixon, John, CFP®
Glovsky, Robert J., CFP®, JD, LLM, CLU®, ChFC®
Johnson, Larry W., CFP®
Keller, Kevin R., CAE
Kissinger, William L., CPA/PFS, CFP®, Lassus, Diahann W., CFP®, CPA
Lewis, Jay L.
(In Memory of Loren Dunton)

Miller, Trisha A., CFP®
Morris, Gary A., CFP®, CLU®, CIMC®
Pitti, Donald R.
Schaeffer, Karen, CFP®, & Rick, CFP®
Sullivan, Bruyette, Speros, Blayney (Sullivan, Gregory D., CFP®, CPA/PFS & Johannesen, Mark, CFP®)
Weil, Curt, CFP®
Williams, Robert J.

$40,000 - $49,999
Anderson, William
Cammack, John H., CFP®
Fiedler, Terri
Fitzhugh, Michael P., CFP®, CPA & Sally
King, James P., MBA, CFP®
Kirchenbauer, Lisa, CFP®, RLP, CeFT (Omega Wealth Management, LLC)
Lau, Judith W., CFP®
Lear, Steven, ChFC®, CLU®
Neiser, Brent & Marion Philanthropic Trust
Sullivan, Robert J., CFP®
The Van Scoyk Family Foundation
Viera, Carlos, CRPC®

$30,000 - $39,999
Barnash, James, CFP®
Dubchansky, Laurie
Dauphiné, Jon, J.D.
Freedman, Barry, CFP®
 Gibson, Roger C., CFP®, CFA®
Glassman, Barry, CFP®
Goldman, Charles G.
Harrison, Ben
Holland, Cheryl, CFP®
Huxford, David C. Dusty
Lennick, Douglas A., CFP®
Oberlin, Cliff, CFP®, CPA/PFS & Polly
Oros, Robert and Lisa
Peniston, Jim
Richardson, Ross W., MS, CFP®
Robertson, Griege & Theole
Tuttle, Marvin W., CAE
Williams, Lorraine
Yeske Buie Team
(Abugideiri, Yusuf, CFP®, Grove, Lauren; Hicks, Jennifer, CFP®, Micieli, Jennifer, CFP®, Mireles, Lauren)

$25,000 - $29,999
1st Global, Inc.
Apriem Advisors
Arpante, Stephen J.
Berg, Robert H., CFP®
Blakeslee, Diane, CFP®
Blankinship & Foster
(Blankinship, John & Foster, Charles)
Botsford, Erin T., CFP®
Bowen, John J., Jr.
Csenge, John L., CFP®, CIMC®
Conger, Cynthia L., CPA/PFS, CFP®
Coombs, Colin B., CFP®, CLU®
Egan, Michael P., CFP®
Financial Profiles, Inc.
(Hansch, Thomas, CLU®, CFP®)
Flett, Eric
Greene, M. Anthony
Gunther, Marilyn M.
Hawn, Gates Helms
Henriques, Allan C.
Hohman, James D., CFP®
Jacobs, Brian, CIMC®, CFP®
Kistner, Nancy A., CFP®
Larson, Steve
Loss, P. Alan, CFP®
Marshall, William P., CFP®
McCoy, Jerry J.
Meyers, Andrew
Moore, E. Blake, Jr.
Muldoon, Kathleen, CFP®
Noveck, Madeline I., CFP®
O’Hara, Stephen P., CFP®
Peurifoy, Joan H., CFP®
Shendure, Ashok, MBA, CFP®,
& Raj, MBA, CFP®
Stratos Wealth Partners
Sullivan, Mary K., CLU®, ChFC®,
CASL®, MBA
Totten, Jay, CFA®,
Vawter, Gary L., CFP®, MS, ChFC®,
AEP®,
Votava, Joe & Katy

$20,000 - $24,999
Dalal, Mayur T., MBA
Cardno, Sheila L., MBA
Carnick, Craig Evans, CFP®
Gahagan, Kevin M., CIMC®, CFP®
Gemmer, Brian
Ginn, Mary C., CFP®, EA
Halter Ferguson Financial, Inc.
Hansen, Derek S.
Hertz, Mel R., MBA, CFP®
Ketron, Russell W., CFP®
Kubey, Phyllis Jo, EA, CFP®
Lee, Richard R., CFA®, CFP®
Mosher, Jerry S., CFP®
Neugebauer, Phillip J.

$15,000 - $19,999
Agnew, James, CFP®, CMFC®, EA
Arsenault, Craig
Bell, Joe & Heather
Bluth, Michael T.
Bragar, Sandra L., CPA, CFP®
Brennan, David M., Sr.
Cumbie, Guy M., CFP®, CIMC®,
CIMC®
Fain, Paul K., III
Filbrandt, Patricia J., CFP®, CLU®,
Furey, John
Gruber, Joseph B. “Joby”
Hansen, Derek S.
Helms, Jeffrey
Holley, Daniel
Kamin, Viktoria, CFP®
McCord, Jack
McGrath, Todd A.
Nardone, Laurie, CFP®
Patrick, James K., IV
Petersen, Kris
Pittsford, Gary, CFP®
Pon, Lawrence K., CPA/PFS, CFP®
Ricinak, Michael D., Jr., MBA, CSA,
CFP®
Ryan, Mike, CFP®
Schwab-Pomerantz, Carrie
Tibergien, Mark
Wallensky, Lewis M., CFP®
Wherley, Clare, CPA, CFP®

$10,000 - $14,999
Alexander, Daniel
Alford-Cooper, D. Crystal, CFP®,
CRC®
Allison, Thom, CFP®
Anderson, Daniel W., CLU®, ChFC®
Baker, Lee A., CFP®
Bass, Mark I., CFP®, CPA
Beckes, Tracy L., MBA
The Bicknell Family Foundation
Brady, William P.
Bridge Financial Advisors
Broadridge/Forefield
Burch, Robert A.
Carpenter, Dennis, CFP®
Ciccarelli, Ray & Kantor, Kim, CFP®,
CAP
Colman, Gayle Knight, CFP® & Rich
Cordes, Ron
Couch, Allison L.
Deremo, John B.
Duncan, Sharon, CFP®, MBA, AIF
Dunne, C. Gordon
Edelstein, Philip D.
Egan, Michael J.
Fahy, Jim
Farrow, John, CFP®
Ferguson, Rhonda, CFP®, CFS
Ferguson, Scott K., CFP®
Feingold, Saul F.
Ferris, Susan
Frater, Robert, CFP®
Gallagher, Clay & Sue
Gardner, Gary
Gemmer, Dave
Gengo, Joseph
Geppner, Robert M.
sburg, Larry P., CFP®
Girouard, John E., CFP®, ChFC®,
CLU®, CFS®
Goff, John
Gordon, Joseph M., CFP®
Gurtz, Dennis M., CPA/PFS, CFP®,
CFA®
Harrington, Timothy, CFP®
Hoffman, Richard H.
Hutchins, Thomas W.
John, Susan, CFP®
Johnson, Phillip O., CFP®
Kalas, Michael R., CFP®
Kaplan, Susan, CFP®, MBA
Kark, Vera (In Honor of John Kark)
Kendall, Susan L., CPA, CFP®
Kitces, Michael E., MSFS, MTAX,
CFP®, CLU®, ChFC®, RHU, REBC,
CASL
Klosterman, Robert J., CFP®, CLU®,
ChFC®
Kreitler, Robert P., CFP®
Latza, Ralph G., CFP®, JD, LLM
Lauterbach, Jeffrey & Vicki
Legend Financial Advisors
Livergood, Thomas R., CFP®
Livingston, Fredrick J., CFP®
Maloy, Deborah D., CFP®
Matt, Ruth M., CFP®
Mattise, Michael N., CFP®
May, Daniel & Kris
McIntire, Thomas R., CFP®, CLU®, CFA® & Lynn B., CFP®, CLU®
Mekonnen, Tedla
Mersereau, Nathan
Metcalf, Melly, CFP®
Meza, Omar
Modly, Helen
Moleski, Eric, CFP® AIF®
Moran, Richard P., CFP®
Nasstrom, Sharon S., CFP®
Nesvold, Elizabeth Bloomer
Niemeyer, A. Herman, CFP®, CLU®, ChFC®
O'Connor, Matthew P.
Pennington, Bass & Associates
Pepkin, Charles, MBA, CFP®
Perryman, William, CPA, CFP®
Potts, Tom L., Ph.D., CFP®
Pugliese, Frank T., CLMA®, CFS®
Putney, Charles A., CFP®, EA
Quigley, Jennifer L.
Royce, Charles M.
Sachetta, Joseph, CPA, CFP®
Sandy, Pamela S., CFP®
Schefer, Joshua, CFP®
Schopen, Joseph J., CFP®
Scottino, Tara, CFP®
Shine, Judith A., CFP®
Simonoff, Evan
Smith, Michael & Jetton, Elizabeth, CFP®
Sober, Charles T., Jr.
Searns, Dennis, CFP®, ChFC®
Still, Tim & Barbara
Stith, Daniel C.
Strand, Russell
Stratos Wealth Partners
(Concepcion, Jeffrey)
Strege, David G., CFP®, CFA®
Sullivan-Kreiss Financial
Terry, Tom
The Bullock Family Foundation
The Summit Study Group, Inc.
Tobias, Benjamin
Tsui, Maureen, MBA, CFP®
Uno, Anne, CFP®, EA
Wacker, R. E., CFP®, EA
Warman, David S.
West, Thomas C.

$7,500 - $9,999
Adamo, Ralph G., CFP®
Bishop, Malcolm F.
Bowes, Chuck, CFP®
Casey, Brian C.
CFP® Board of Standards
Crane, Kelly F., CFP®, CFA®, CLU®
Duffy, Shawn
Glowacki, Michael, CPA, CFP®, MBT
Golden, Anne B., CFP®
Graves, B. Kelly
Harmon, Jack C., CFP®, CIMA®
Harris, Mary G., CFP®
Jones, Troy E., CFP®
Kahler, Richard S., CFP®, CCIM, ChFC®, MS
Koesten, Stewart S., MSFS, CFP®, CIMA®
Lowell, Sabrina, CFP®
Mathe, Lynn, CPA
McDermott, Daniel, ChFC®, CFP®
Reitman, Steven J.
Schneider, Janice, CFP®
Shearer, William B., Jr., PC
The Arkansas Financial Group
(Adkins, Rick, CFP®, ChFC®, CLU®)
The EDSA Group, Inc.
(Shobe, Ed & Pomeroy, Bill)
Turner, Trudy, CPA, CFP® & Jim
Volpe, Richard, CFP®, CLU®, ChFC®

$5,000 - $7,499
Adelman, Valerie CFP®, EA
Akin, Blaine, CFP®, CFA, AIFA®
Andersen, Daniel, CFP®
Atkinson, Jamie
A-lign CPAs
Baird, Kay H., CFP® & Rick
Barajas, Louis, CFP®, MBA, EA
Bardine, Richard S., JD, CFP®
Barkat, Shakesel
Barry, Robert, CFP®
Behringer Harvard Funds
Bell, James F., CFP®
Benningfield, Milo
Beyrer, Jon P., CFP®
Brandenburg, J. Sheldon, CFP®
Braxton, Lazetta, CFP®
Brey, Lesley J., CFP®
Burt, Marvin R., CPA, CFP®
Burton, Peter
Causing, Myla
Chan, Paul W.
Chen, Curtis, CFP®
Chesney, Susan
Chrysostomides, Pandelis P., EA,
CFP®, ChFC®

Clarke, Eric
Coit, Lauryn
Commonwealth Cares Foundation
Cordis Financial
Corkern, Barry M., CFP®, AIFA®
Couture, Damien, CFP®
Cribbs, Jeffrey, CFP®, MBA, RIA
Crittell, Douglas A.
Curtis, Tom W., CFP®
Dance, Harold W., MBA, CPCU, CFP®
Darraaq, Dal J., CLU®, ChFC®
Davis, LeCount R., Sr., CFP®
Dean, Eleanor R.
DeCharles, Diana, CFP®
Demming, David W., Sr., CFP®
Determan, Marjorie F., CFP®
Dorion-Gray, Paula, CFP®
Farley, John U., Jr.
Farley, Patrick M., CFP®, CLU®, ChFC®
Fishman, Andrew
Foley, Karen
Foord, Elfrena S., CFP®
Franklin, Jeffrey M., CFP®
Franklin, Joyce
Gargula, Carl G., J.D.
Garvin, Gregory J.
Gilbert, Reed
Glassman Wealth Services
Glover, Kevin
Goldfarb, Alan & Terry Philanthropic Fund
Goss, Robert P., JD, PhD
Graham, Richard E., CFP®
Grant, Arthur F.
Green/White Advisors
(Green, Bill L., CPA, CFP® & White, Sandra L., CFP®)
Hancock, Byron W., CFP®
Hanson, Herbert T., CFP® CLU®, ChFC®
Harris, Jason
Harrison, Laurent, CFP®
Heath, William C., CFP® & Burell, Marilyn, CFP®
Heinsma, David J.
Hofmann, Christoph & Camilla
Home, Stephen D., MBA
Houlihan, Patricia P., CFP®
Howard, Thomas
Hoxton, Archibald R., IV, CFP®, AAMS, AIF®
Hurley, Robert G., CFP®
Isaacson, Joel S., CPA, MBA, CFP®
Israel, Janell A., CFP®
Johnson Jones, Nancy, CFP®, CSCP & Mark Jones
Kaye, Marvyn, J.D., CFP®
Kelzenberg, Todd
Kilner, Joe, CFP®
Kim, Susan, CFP®, CRPC®
Kopczynski, Joseph J., ChFC®, CFP®
Kuzmich, Bill & Priscilla
Lara, Edward R., CFP®
LaBrecque, Leon C., CPA, CFP®, CFA®
Lefferts, Peter A.
Leveroni Family Foundation
Levine, Allan & Karen
Lewis, “Chip” Trevor, Jr., CFP®
Litman Gregory Asset Mgmt., LLC
Logan, Greg P., CPA
Longstaff, John
MacIntyre, John A., CLU®, CFP®
Marinace, Kenneth
Mawdsley, Toni, CLTC, CSA
Meaney, Jonathan R., CFP®
McCallen, Janet
McCurdy, Jeffrey
Meany, Jonathan R., CFP®
Menzel, Thomas L., CFP®
Metzger, Conrad & Lauri
Meyer, Wayne F.
Mission Wealth
Mittra, Sid, Ph.D., CFP®
Mullins, John E. & Moss, Todd R.
Murphy, Robert F.
Murray, Nicholas
Nicholson, R. L. Nick, CFP®
O’Lear, Daniel
Olsen, Christopher J., CFP®
Orr, Kelly C.
Pape, Glenn M., CFP®, CPA, JD
Pare, Frank, CFP®
Parisse, Alan J.
Pash International (Pash, Mark, CFP® & Benson, Gary, CFP®)
The Pazera Family Foundation
Pence, Lee, CFP®, CSA, AAMS
Petersen, David R., CFP®
Perrone, Edward H., CFP®
Petersen, Eric K., CFP®
Portfolio Timing Service
(Wadsworth, William F.)
Quach, Phuong N., CFP®, CRPC®
Rede, Sue J., CFP®
Reed, Roger H., CFP®
Roe, Daniel, CFP®
Rogers, J. Scott
Romano, Doug
Rudman, Stephen J.
Schadle, Lauren, CAE
Schupbach, Mark, ChFC®
Seay, Martin
Shmidt, Tim, CFP®
Shuck, Robert F., CFP®
Smith, Gregory S., CFP®, ChFC®
Smith, Roger T., CFP®, CPWA®, IACCP®
Stack, Chris
Stefany, Bruce R., CLU®
Starner, Margaret C., CFP®
Svach, Anthony
Szabo, K. Esther, CFP®
Tanner, Beverly F., CFP®
Tully, Ami M., CFP® & Lotka, John
Vansickle, Randolph
Warner, Barbara A., CFP®
Wasserman, Mindee, CFP®
Weiss, Alan P., CFP®, CPA
Welch, Margaret M., CFP®
Wiser, Ronald, CFP®, CLU®, ChFC®
Wetherby Asset Management
Yurachek, Paul A., JD, CPA, CFP®

$2,500 - $4,999
Albertson, Randy L., CPA, PA
Alderson, Martha E., CFP®
Anderson, Carol, MS
Armstrong, Stuart H., II, CFP®, CLU®, CLTC, ADPA
Arzaga, Rich
Baker, Gilbert J., CFP®, CLU®, ChFC®
Bell, C. Cameron, CFP®
Barr, Kevin
Barrett, Elizabeth Ann, CFP®
Ben-David, Dori, CFP®, ChFC®
Bergen, Marilyn R., CFP®
Bergeron, Michelle
Bergstein, Warren M, CPA
Bingham, Osborn & Scarborough
Blandin, Don M.
Blasi, Edward J., CLU®
Blodgett, Karen R., CFP®
Bown, Kenneth
Brand, David
Brown, C. Alan
Brown, Dale E., CAE
Brown, Geoffrey, CAE
Brown, U. Calvin
Bugen, David, CFP®
Burgess, Larry W., CFP®, CLU®, ChFC®
Burke, Martin J., CIMA®
Busby, Sue

Candura, Daniel J., CFP®
Cassato, Vic C.
Cassin, Christopher J.
Chase, Rachelle, CFP®
Cheng, Marguerita, CFP®, CRPC®
Cipolla, Lindsay
Citron, Ora R., MBA
Clark, Howard, CPA, AIFA®
Cody, Michele A.
Cole, Robert J., CLU®, ChFC®, CASL®, CFP®
Collier, Ruth M.
Comer, John M., CFP®
Corrigan, Daniel G., CPA/PFS, CFP®
Cox, Richard L., CFP®, ChFC®, CLU®, ATA
Cray, Jennifer H., CFP®
Davis, Amanda
Day, Kathleen, CFP®, CFA®
Decker, Guy
Diffendaffer, Gary, CFP®
Dix, William K., CLU®, ChFC®
Douglas, Julie A., CFP®, CLU®, AEP®
Downer, Michael J.
Dugan, Jack, CFP®
Escobedo, Jim A.
Everett, Douglas K., CFP®
Fernandez, George, CFP®
Fitch, Claudia
Foster, John H., ChFC®, CLU®
Foul, Eric
FPP Tech Tour/inStream
Fraasa, Reed C., CFP®, RLP
Freed, Susan, CFP®
Freedman, Mitchell
Fure, Johannes C., CFP®
Goldman, Emilie R., CFA®, CFP®
Grosvenor, Carol, CFP®
Goot, John, CFP®, AIF®
Gordon, Yonhee, CFP®
Stan and Joan Green Family Fund
Hartman, Omega, CFP®
(Honoring the Memory of Thomas J. Hartman)
Hanes, Ken M., CPA/PFS, CFP®, AIFA®
Harrelson, Calvin
Harvey, Michael D.
Haubrich, Michael P., CFP®
Henry, George F., CFP®
Hewitt, Alan E., CFP®, CIRAS, ATA
Higgins, Timothy
Howard, Thomas L., CFP®
Hurst, Jess W., II, CFP®
Hutchinson, Burt, III, CPA, CFP®
Irvine, Amy, CFP®
Integral Financial Solutions
Isabelle, Gilliane
Johnson, Steve, CFP®
Jones, Charles P., CFP®
Jowdy, Michael W., CFP®
Kamola, John W., CFP®
Kass, Richard P., CFP®
Keatley, Jaren R., CFP®, CFA®,
Keeler, Andrew, CFP®
Keidan, Robert
Kennedy, Jim R.
Kruzan, James B., CFP®
Gayle Lois Kinnison Charitable Fund
Koch, James E.
Kolbas, Lydia, CFP®, CLU®, ChFC®
Kong, Barbara Holian, CFP®
Kulik, Jeffrey S.
Leeb, William M., CFP®
Lefkowitz, Charles B., CFP®
Lyman, Robert A., CFP®
Maas, Jeff R., CFP®, ChFC®, CRPC®
Mandella, Teresa L.
Manley, Randall, JD, MBA, CIMC®
Maton, Cicily & Michelle
Mayer, Jacqueline, CFP®
McAvoy, Karla J., CFP®
McCarthy, Steve P., CFP®, CPA
McCurdy, J Donald, MBA
McMenamin, Joseph T.
Moore, Franklin, MS, CFP®
Morganstern, David, CFP®
Moshenko, James P., CFP®
Murguia, Alejandro, PhD
Neeley, Mary Beth, CFP®
Nichols, James T.
Nixon Peabody Financial Advisors, LLC
O'Leary, Brenda J.
Parker, Christine Marie, CFP®
Parrott, Bill
Pike, Shannon J., CFP®
Pitney, William D., MBA, CFP®, AIP®, RFC®
Polstera, David, CPA, CFP®, CIMA®, PFS
Qualters, Don
Rabbanian, Eric, CFP®
Reed, Andrew
Roberts, Carol Lee, CFP®
Robinson, David P., CFP®
Robinson, Thomas, PhD, CPA, CFP®, CFA®
Rose, Ben, CFP®
Rosoff, Jay
Rossi, Joan, CFP®
The Rotary Foundation
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