## Our Corporate & Individual Contributors

*(as of November 21, 2023)*

### CORPORATE

**$2,000,000 up**
- Charles Schwab & Co., Inc. & Charles Schwab Foundation

**$1,500,000 – $1,999,999**
- Corebridge Financial
- Fidelity Investments

**$1,000,000 - $1,499,999**
- Allianz Group
  - (Allianz Global Investors, Allianz Life Insurance Company)
  - Ameriprise Financial, Inc.
  - TD Ameritrade Institutional

**$500,000 - $999,999**
- Capital Group/American Funds
- Invesco
- Pershing Wealth Solutions

**$350,000 - $499,999**
- BlackRock
- Lincoln Financial Network
- LPL Financial
- SEI
- Orion Advisor Solutions, LLC

**$250,000 - $349,999**
- Cetera Financial Group
- Commonwealth Financial Network
- DWS Investments
- Franklin Templeton Investments
- Prudential Financial, Inc.
- T. Rowe Price Investment Services

**$200,000 - $249,999**
- AssetMark
- Dimensional Fund Advisors
- Envestnet, Inc.
- Raymond James Financial Services

**$150,000 - $199,999**
- The Cambridge Foundation
- CNL Securities Corp.

**$100,000 - $149,999**
- Bailey & Glasser LLP
- CAIS
- Columbia Management Distributors
- eMoney Advisor
- Axos (E*TRADE Advisor Services)
- Focus Financial Partners
- Goldman Sachs
- MFS Investment Management
- PENNYMAC
- Pioneer Funds
- Putnam Investments
- Thornburg Investment Management
- Wells Real Estate Funds

**$50,000 - $99,999**
- AllianceBernstein
- Cadaret, Grant & Co., Inc.
- Calvert Investments
- Dreyfus Corporation
- Forward Funds
- Hines Real Estate Securities
- Inland Securities Corporation
- Ivy Funds
- Morningstar, Inc.
- RidgeWorth Investments
- WealthManagement.com
- W. P. Carey & Co., LLC

### RIA IMPACT PARTNERS

- Accredited Investors Wealth Management®
- Buckingham Strategic Wealth
- Corient
- Edelman Financial Engines
- Hightower Advisors
- JMG Financial
- SEIA: Signature Estate & Investment Advisors
- Stratos Wealth Partners
- Thrivent Advisor Network, LLC
$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
The Carroll Family
Carter, Bill E., CFP®, ChFC®, CLU®
Clark, Bernie
Edelman Financial Engines
FPA of National Capital Area
Friedman, Greg, CFP®, MS
Kahan, Scott M., CFP®
Meritas Wealth Management
(Clarke, Gregg E. & Tiffani, CFP®; Gott, Kacy, CFP®)
Yeske Buie Inc.

$150,000 - $199,999
Bedel, Elaine, CFP®
CJM Wealth Advisers, LTD
(Baker, Tracey A., CFP®; Brady, Claudia C., CFP®; Greene, David D., CFP®; Jones, Brian T., CFP®; Jones, Timothy W., CFP®; McLeland, Kim A., CFP®; Ness, Jessica R., CFP®)
Clifford, Kevin G.
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®
Aspirant
Bachrach, William “Bill”
Brostrom, Ilene, CFP® & Kent Chornyak & Associates
Edelman, Ric & Jean

Ferrara, V. Raymond, CFP®, CSA
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 Family Office

$75,000 - $99,999
Boone, Norman M., MBA, CFP® & Lubitz Boone, Linda, CFP®
Canter, David E.
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)
VLP Financial Advisors
(Bruce Vaughn, CFP®, AIF®, Patricia Vaughn, Dan Lash, CFP®, AIF® & Rose Price, CFP®, AIF®)

$50,000 - $74,999
Cambeck, John E.
CFP Board of Standards
The Deena Jo Heide-Diesslin Foundation
Dellinger, Kyn, EA, CFP®
Dimitroff, Marilyn Capelli, CFP®
Dixon, John, CFP®
Fiedler, Terri
Glovsky, Robert J., CFP®, JD, LLM, CLU®, ChFC®
Johnson, Larry W., CFP®
Keller, Kevin R., CAE
Kissinger, William I., 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®, CIMA®
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®
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
Richardson, Ross W., MS, CFP®
Sullivan, Robert J., CFP®
The Van Scoy Foundation Family
Viera, Carlos, CRPC®

$30,000 - $39,999
Barnash, James, CFP®
Dubchansky, Laurie, CFP®
Dauphiné, Jon, J.D.
Freedman, Barry, CFP®
Gibson, Roger C., CFP®, CFA®
Glassman, Barry, CFP®
Goldman, Charles G.
Gunther, Marilyn M., CFP®
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
Robertson, Grieg & Theole
Prendergast, Mark & Zohlen, Evelyn
Totten, Jay, CFA®
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
Ginn, Mary C., CFP®, EA
Greene, M. Anthony
Hawn, Gates Helms
Henriques, Allan C.
Hohman, James D., CFP®
Jacobs, Brian, CIMA®
Jones, Alton C.
Keeble, John B., III, JD
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®
Nicolette, Nicholas, CFP®
Noveck, Madeline L., CFP®
O’Hara, Stephen P., CFP®
Peurifoy, Joan H., CFP®
Ryan, John, CFP®
Shendure, Ashok, MBA, CFP®
  & Raj, MBA, CFP®
Stratos Wealth Partners
Sullivan, Mary K., CLU®, ChFC®,
  CASL®, MBA
Vawter, Gary L., CFP®, MS, ChFC®,
  AEP®
Votava, Joe & Kay
Zaid, Hussain, CFP®

$20,000 - $24,999
Dalal, Mayur T., MBA
Cardno, Sheila L., MBA
Carnick, Craig Evans, CFP®
Gahagan, Kevin M., CIMA®, CFP®
Gemmer, Brian
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.
Ngo, Eddie, CFP®
O’Neill, Heather R., CFP®, ChFC®
Quigley, Jennifer B., CFP®, CASL®
Rembert, D’Orazio & Fox, Inc.
Rojeck, Richard P., CFP®
Salmen, Richard, CFP® CFA®, EA,
  CFTA
Satovsky, Jonathan M., CFP®, ChFC®,
  CIMA®
Schimek, Rob
Shim, Anne, AEP®, CFP®, EA
Stanzak, Janet, CFP®
West, Thomas C.
Youel, Marilyn and Alan
Young, David W., III, CFP®, RFC®, AIF®,
  (Clarion Wealth Management Partners)

$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®, CIMA®,
  CIMA®
Fain, Paul K., III
Ferguson, Rhonda, CFP®, CFS
Filbrantd, Patricia J., CFP®, CLU®
Furey, John
Gaff, John
Gruber, Joseph B. “Joby”
Hansen, Derek S.
Helms, Jeffrey
Holley, Daniel
Kamin, Viktoria, CFP®
McCord, Jack
McGrath, Todd A.
Nardone, Laurie, CFP®
Nesvold, Elizabeth Bloomer
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®
Wheeler, 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
Ferguson, Scott K., CFP®
Feingold, Saul F.
Ferris, Susan
Frater, Robert, CFP®
Gallagher, Clay & Sue
Gardner, Gary
Gemmer, Dave
Gengo, Joseph
Geppner, Robert M.
Ginsburg, Larry P., CFP®
Girouard, John E., CFP®, CHFC®,
  CLU®, CFS®
Gordon, Joseph M., CFP®
Grey, Eric
Gurtz, Dennis M., CPA/PFS, CFP®,
  CFA®
Harrington, Timothy, CFP®
Hoffman, Richard H.
Hutchins, Thomas W.
John, Susan, CFP®
Johnson, Phillip O., CFP®
Jones, Troy E., 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

$20,000 - $24,999
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
Ferguson, Scott K., CFP®
Feingold, Saul F.
Ferris, Susan
Frater, Robert, CFP®
Gallagher, Clay & Sue
Gardner, Gary
Gemmer, Dave
Gengo, Joseph
Geppner, Robert M.
Ginsburg, Larry P., CFP®
Girouard, John E., CFP®, CHFC®,
  CLU®, CFS®
Gordon, Joseph M., CFP®
Grey, Eric
Gurtz, Dennis M., CPA/PFS, CFP®,
  CFA®
Harrington, Timothy, CFP®
Hoffman, Richard H.
Hutchins, Thomas W.
John, Susan, CFP®
Johnson, Phillip O., CFP®
Jones, Troy E., 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

$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
Ferguson, Scott K., CFP®
Feingold, Saul F.
Ferris, Susan
Frater, Robert, CFP®
Gallagher, Clay & Sue
Gardner, Gary
Gemmer, Dave
Gengo, Joseph
Geppner, Robert M.
Ginsburg, Larry P., CFP®
Girouard, John E., CFP®, CHFC®,
  CLU®, CFS®
Gordon, Joseph M., CFP®
Grey, Eric
Gurtz, Dennis M., CPA/PFS, CFP®,
  CFA®
Harrington, Timothy, CFP®
Hoffman, Richard H.
Hutchins, Thomas W.
John, Susan, CFP®
Johnson, Phillip O., CFP®
Jones, Troy E., 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®
Niemeier, A. Herman, CFP®, CLU®, ChFC®
O'Connor, Matthew P.
Pennington, Bass & Associates
Pepkin, Charles, MBA, CFP®
Perryman, William, CPA, CFP®
Pike, Shannon J., CFP®
Potts, Tom L., Ph.D., CFP®
Pugliese, Frank T., CIMA®, CFS®
Putney, Charles A., CFP®, EA
Quigley, Jennifer L.
Royce, Charles M.
Sachetta, Joseph, CPA, CFP®
Sandy, Pamela S., CFP®
Schefers, Joshua, CFP®
Schneider, Janice, CFP®
Schopen, Joseph J., CFP®
Scottoino, Tara, CFP®
Shine, Judith A., CFP®
Simonoff, Evan
Smith, Michael & Jetton, Elizabeth, CFP®
Sober, Charles T., Jr.
Stearns, 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
Tsou, Maureen, MBA, CFP®
Uno, Anne, CFP®, EA
Wacker, R. E., CFP®, EA
Warman, David S.
$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®
Demming, David W., Sr., CFP®
Duffy, Shawn
Franklin, Joyce
Glowacki, Michael, CPA, CFP®, MBT
Golden, Anne B., CFP®
Graves, B. Kelly
Harmon, Jack C., CFP®, CIMA®, CM®
Harris, Mary G., CFP®
Kahler, Richard S., CFP®, CCIM, ChFC®, MS
Koesten, Stewart S., MSFS, CFP®, CIMA®
Lowell, Sabrina, CFP®
Mathe, Lynn, CPA
McDermott, Daniel, ChFC®, CFP®
Paré, Frank, CFP®
Reitman, Steven J.
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, AIF®, CFP®
Andersen, Daniel, CFP®
Atkinson, Jamie
A-Bign CPAs
Baird, Kay H., CFP® & Rick
Barajas, Louis, CFP®, MBA, EA
Bardine, Richard S., JD, CFP®
Barkat, Shakeel
Barry, Robert, CFP®
Behringer Harvard Funds
Bell, James F., CFP®
Benningfield, Milo
Beyrer, Jon P., CFP®
Brandenburger, 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
Chryssostomides, 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®
Darraqq, Dal J., CLU®, ChFC®
Davis, LeCount R., Sr., CFP®
Dean, Eleanor R.
DeCharles, Diana, CFP®
Determan, Marjorie F., CFP®
Dorion-Gray, Paula, CFP®
Farley, John U., Jr.
Farley, Patrick M., CFP®, CLU®
Danhman, Andrew
Foley, Karen
Foord, Elfrena S., CFP®
Franklin, Jeffrey M., CFP®
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®
Heinmsa, 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®
Isaacs, Joel S., CPA, MBA, CFP®
Israel, Janell A., CFP®
Johnson Jones, Nancy, CFP®, CSCP & Mark Jones
Kay, 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., JD, CPA, CFP®, CFA®
Lee, James, CFP®
Lefferts, Peter A.
Leveroni Family Foundation
Levine, Allan & Karen
Lewis, “Chip” Trevor, Jr., CFP®
Litman Gregory Asset Mgmt., LLC
Logan, Greg P., CFP®
Longstaff, John
MacIntyre, John A., CLU®, CFP®
Makarico, Kenneth
Mahoney, Brendan T.
Martin-Vegue, Frank, CFP®
Matthews, William, CFP®
Mawdsley, Toni, CLTC, CSA
McCallen, Janet
McCurdy, Jeffrey
Meaney, 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.
Parrott, Bill
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®
Robinson, David P., 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®
Steinhofer, Tanya K., CFA, CFP®
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®
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
Brenn, Jeremy
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
Bryan, James, CFP®
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®
Conner, Rebecca
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
Dietz, Larry
Difffendaffer, Gary, CFP®
Dix, William K., CLU®, ChFC®
Douglas, Julie A., CFP®, CLU®, AEP®
Downer, Michael J.
Dugan, Jack, CFP®
Elliot, Deborah J., CFP®
Escobedo, Jim A.
Everett, Douglas K., CFP®
Farrow, John, 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
Furie, Johannes C., CFP®
Goldman, Emilie R., CFA®, CFP®
Grosvenor, Carol, CFP®
Goot, John, CFP®, AIF®
Gordon, Yonhee, CFP®
Stan and Joan Green Family Fund
<table>
<thead>
<tr>
<th>Name</th>
<th>Designations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ma, Michael</td>
<td>CFP®, MSFS, ChFC</td>
</tr>
<tr>
<td>Mains, Nathan</td>
<td></td>
</tr>
<tr>
<td>Mallonee, Jerry D.</td>
<td>CPA, CFP®</td>
</tr>
<tr>
<td>Mandarino, Diana</td>
<td></td>
</tr>
<tr>
<td>Mangat, Karamjeet S.</td>
<td>CFP®, CRPC®</td>
</tr>
<tr>
<td>Mann, Louis E.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Martin, Joseph A.</td>
<td></td>
</tr>
<tr>
<td>Martinez, Sharla D.</td>
<td>CFP®, CSA</td>
</tr>
<tr>
<td>Mastilak, Josephine F.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Matter, Brian</td>
<td></td>
</tr>
<tr>
<td>Mauck, Daniel R.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Mayer, Ross</td>
<td></td>
</tr>
<tr>
<td>McAdams, Ann H.</td>
<td></td>
</tr>
<tr>
<td>McCarthy, John T.</td>
<td></td>
</tr>
<tr>
<td>McCloskey, Ryan</td>
<td></td>
</tr>
<tr>
<td>McDonald, Mary Pat</td>
<td></td>
</tr>
<tr>
<td>McLaughlin, Pete</td>
<td>CLU®, CFP®</td>
</tr>
<tr>
<td></td>
<td>ChFC®</td>
</tr>
<tr>
<td>Mcllrtrout, Carol Ann</td>
<td>CFP®</td>
</tr>
<tr>
<td>McKinley, David H.</td>
<td>CFP®, AIF®</td>
</tr>
<tr>
<td>McKinley, Sommer</td>
<td></td>
</tr>
<tr>
<td>Meara, Michael F.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Mell, John K., Ill</td>
<td>CFP®</td>
</tr>
<tr>
<td>Meloon, Maureen</td>
<td></td>
</tr>
<tr>
<td>Metzig, Brittany</td>
<td></td>
</tr>
<tr>
<td>Meyers, Lillian</td>
<td></td>
</tr>
<tr>
<td>Mignano, Michael R.</td>
<td>CFP®, CLU®, ChFC®</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Miller, James R.</td>
<td></td>
</tr>
<tr>
<td>Miller, Robert</td>
<td>CFP®</td>
</tr>
<tr>
<td>Miller, Susie</td>
<td></td>
</tr>
<tr>
<td>Milliorn, Brice</td>
<td>CFP®</td>
</tr>
<tr>
<td>Mirchandani, Sanjiv</td>
<td></td>
</tr>
<tr>
<td>Mistry, Tina</td>
<td></td>
</tr>
<tr>
<td>Monin, Robert C.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Moore, David</td>
<td>CFP® &amp; Kathleen</td>
</tr>
<tr>
<td>Moore, Kim J.</td>
<td>CFP®, CLU®, ChFC®</td>
</tr>
<tr>
<td>Moore-Jones, Olivia</td>
<td></td>
</tr>
<tr>
<td>Moran, Charles JD</td>
<td>CFP®</td>
</tr>
<tr>
<td>Morris, Kyra H.</td>
<td>CFP®, EA</td>
</tr>
<tr>
<td>Morrissey, William T.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Morton, Ted</td>
<td></td>
</tr>
<tr>
<td>Mosaic Financial Partners</td>
<td></td>
</tr>
<tr>
<td>Moxon, John</td>
<td></td>
</tr>
<tr>
<td>Mullen, Anne Marie</td>
<td></td>
</tr>
<tr>
<td>Mulligan, Marla</td>
<td></td>
</tr>
<tr>
<td>Munroe, Bobbie D.</td>
<td>CFP®</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(Richard C. Munroe Foundation, Inc.)</td>
</tr>
<tr>
<td>Murray, Kathleen M.</td>
<td>CFP®, MS</td>
</tr>
<tr>
<td>Musachino, Patricia A.</td>
<td></td>
</tr>
<tr>
<td>Myers, Jerrilynn</td>
<td>CFP®</td>
</tr>
<tr>
<td>Nelson, David M.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Newton, Ryan</td>
<td></td>
</tr>
<tr>
<td>Ng, Sally W.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Nicholson, Kristin</td>
<td>CFP®</td>
</tr>
<tr>
<td>Nobari, Kian S.</td>
<td></td>
</tr>
<tr>
<td>Nowak, Joanna</td>
<td>CFP®, MBA</td>
</tr>
<tr>
<td>Ochterbeck, Rick</td>
<td>CFP®</td>
</tr>
<tr>
<td>O’Connell, Ray</td>
<td></td>
</tr>
<tr>
<td>O’Conner, Cliff</td>
<td></td>
</tr>
<tr>
<td>Olsen, Larry G.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Olson, Mark D.</td>
<td>CFP®, MSFS</td>
</tr>
<tr>
<td>O’Neill, Terry</td>
<td></td>
</tr>
<tr>
<td>Opalski, Joseph J.</td>
<td></td>
</tr>
<tr>
<td>Osborn, Dave</td>
<td></td>
</tr>
<tr>
<td>Ostomel, Adele, MS</td>
<td>CFP®</td>
</tr>
<tr>
<td>Overton, Fred</td>
<td>CFP®</td>
</tr>
<tr>
<td>Owen, Karen C.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Pain, Lincoln</td>
<td>CFP®, AIF®</td>
</tr>
<tr>
<td>Pajak, Laura</td>
<td>CFP®</td>
</tr>
<tr>
<td>Palao, Kathryn</td>
<td>CFP®</td>
</tr>
<tr>
<td>Palmin, Lydia</td>
<td>CFP®</td>
</tr>
<tr>
<td>Pastolove, Craig</td>
<td></td>
</tr>
<tr>
<td>Patterson, Robert B.</td>
<td>MBA, CFP®</td>
</tr>
<tr>
<td>Payne, John</td>
<td>CFP®</td>
</tr>
<tr>
<td>Pearce, Jeffrey J.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Pearson, Diane M.</td>
<td></td>
</tr>
<tr>
<td>Peebles, William</td>
<td></td>
</tr>
<tr>
<td>Perine, Ken</td>
<td>CFP®</td>
</tr>
<tr>
<td>Perrino, Paul</td>
<td></td>
</tr>
<tr>
<td>Perry, David A.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Peters, Louis W.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Peterson, Robert</td>
<td></td>
</tr>
<tr>
<td>Pierce, Mary Lee</td>
<td>CFP®</td>
</tr>
<tr>
<td>Pierson, James R., II</td>
<td>CMPS</td>
</tr>
<tr>
<td>Pigott, Mary</td>
<td></td>
</tr>
<tr>
<td>Pisapia, Glynne</td>
<td></td>
</tr>
<tr>
<td>Piscura, Robert C.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Pitzl, Joseph &amp; Rebecca</td>
<td></td>
</tr>
<tr>
<td>Polk, Stephen M.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Pomerening, Rebecca H.</td>
<td></td>
</tr>
<tr>
<td>Porter, Valerie L.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Potomac, L. Lawrence</td>
<td>CFP®</td>
</tr>
<tr>
<td>Potter, Charles J.</td>
<td></td>
</tr>
<tr>
<td>Presper, Thomas</td>
<td></td>
</tr>
<tr>
<td>Preysnar, Karen</td>
<td>CFP®, CCPS</td>
</tr>
<tr>
<td>Prince, Lauren</td>
<td>CFP®, CDFA, CLTC</td>
</tr>
<tr>
<td>Prokott, Greg</td>
<td></td>
</tr>
<tr>
<td>Prouy, Tammera Lynn</td>
<td>CFP®</td>
</tr>
<tr>
<td>Pursey, Debbie L.</td>
<td>CFP®, MBA</td>
</tr>
<tr>
<td>PYA Waltman Capital, LLC</td>
<td></td>
</tr>
<tr>
<td>R. Alston, Lance</td>
<td></td>
</tr>
<tr>
<td>Rapps, Jill C.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Reinert, Richard Jr.</td>
<td></td>
</tr>
<tr>
<td>Reinhold, Sue, Ph.D.</td>
<td></td>
</tr>
<tr>
<td>Rekow, Mark</td>
<td>CFP®</td>
</tr>
<tr>
<td>Remedios, Chris</td>
<td></td>
</tr>
<tr>
<td>Rettger, Karin</td>
<td></td>
</tr>
<tr>
<td>Ried, Paul M.</td>
<td>MBA, CFP®</td>
</tr>
<tr>
<td>Rigg, Kevin M.</td>
<td>CPA, CFP®</td>
</tr>
<tr>
<td>Robb, Josh</td>
<td></td>
</tr>
<tr>
<td>Robbins, Karla</td>
<td></td>
</tr>
<tr>
<td>Robello, Clifford M.</td>
<td>CFP®, ChFC®, CFS</td>
</tr>
<tr>
<td>Roberts, Michael D.</td>
<td></td>
</tr>
<tr>
<td>Robinson, G. William</td>
<td>ChFC®, CLU®</td>
</tr>
<tr>
<td>Robinson, Jeffrey J.</td>
<td></td>
</tr>
<tr>
<td>Robinson, Sheri</td>
<td>CFP®, CPA</td>
</tr>
<tr>
<td>Roby, Tracy Paul</td>
<td>CFP®</td>
</tr>
<tr>
<td>Rogers, Jon M.</td>
<td></td>
</tr>
<tr>
<td>Roniger, Rory C.</td>
<td></td>
</tr>
<tr>
<td>Rooney, John</td>
<td></td>
</tr>
<tr>
<td>Rose, Mary T.</td>
<td></td>
</tr>
<tr>
<td>Ross, Michael</td>
<td></td>
</tr>
<tr>
<td>Rottura, Romolo D.</td>
<td></td>
</tr>
<tr>
<td>Rumschik, Allison</td>
<td></td>
</tr>
<tr>
<td>Runey, James, CFA</td>
<td></td>
</tr>
<tr>
<td>Ryan, William M., Jr.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Rydell, Ronald</td>
<td>CFP®</td>
</tr>
<tr>
<td>Saleem, Susan</td>
<td>CFP®, MBA</td>
</tr>
<tr>
<td>Salomon, Arthur</td>
<td></td>
</tr>
<tr>
<td>Salter, John</td>
<td></td>
</tr>
<tr>
<td>Salverda, Lauri</td>
<td></td>
</tr>
<tr>
<td>Sampson, Scott</td>
<td>CFP®</td>
</tr>
<tr>
<td>Sanford, Todd A.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Santoro, Paul V.</td>
<td></td>
</tr>
<tr>
<td>Sanvordenker, Viola C.</td>
<td>PhD, CFP®</td>
</tr>
<tr>
<td>Saunders, Barbara R.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Scagliotti, Teresa</td>
<td>CFP®</td>
</tr>
<tr>
<td>Schatz, Julie A.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Schaus, Stacy L.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Schick, Gregory</td>
<td>CFP®</td>
</tr>
<tr>
<td>Schmidt, Karl A.</td>
<td></td>
</tr>
<tr>
<td>Schmoekel, Aaron C.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Schnur, Joyce O.</td>
<td></td>
</tr>
<tr>
<td>Schoenborn, Laura S.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Schroeder, June</td>
<td>CFP®</td>
</tr>
<tr>
<td>Schuelke, Suzanne K.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Schultz, Patrick</td>
<td></td>
</tr>
<tr>
<td>Schwartz, Jeffrey</td>
<td></td>
</tr>
<tr>
<td>Scipione, Louis T.</td>
<td>CFP®, CPA</td>
</tr>
<tr>
<td>Sears, Jeffrey A.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Sebold, Sean</td>
<td>CFA®, CFP®</td>
</tr>
<tr>
<td>Segal, Spenser</td>
<td></td>
</tr>
<tr>
<td>Severt, Dan</td>
<td></td>
</tr>
<tr>
<td>Sen, Sunandan</td>
<td>CFP®, MSFS</td>
</tr>
<tr>
<td>Sennott, Burke</td>
<td></td>
</tr>
<tr>
<td>Sewell, James</td>
<td></td>
</tr>
<tr>
<td>Shamis, Jeff D.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Shimamoto, Leigh</td>
<td></td>
</tr>
<tr>
<td>Showley, Matthew B.</td>
<td></td>
</tr>
<tr>
<td>Siesta, Martin J.</td>
<td>CFP®, ChFC®, MSFS</td>
</tr>
<tr>
<td>Silverman, Claire</td>
<td></td>
</tr>
<tr>
<td>Slater, Kevin L.</td>
<td>CFP®</td>
</tr>
<tr>
<td>Sloan, Gregory</td>
<td>CFP®</td>
</tr>
<tr>
<td>Smith, Chad</td>
<td></td>
</tr>
<tr>
<td>Smith, David</td>
<td>CFP®, MSFS</td>
</tr>
<tr>
<td>Smith, Holly</td>
<td></td>
</tr>
<tr>
<td>Stein, Carol</td>
<td>CFP®</td>
</tr>
</tbody>
</table>
Vanian, Jeannine
Veazey, George F.
Veres, Robert N.
Vessenes, Katherine, JD, CFP®
Wade, Rodney, CFP®, EA, MST
Wagman, Bob
Wagner, Randy
Waldrup, Jared
Wales, Dana L., CFP®
Wallace, Scott M., CFP®
Walters, Edward
War, Anne M.
Wargin, Tom, CFP®, CFA
Wasko, Carol
Wearworth, Timothy J., CFP®
Waypoint Wealth Partners
Wechsler, Mary sue, CFP®, CRC
Weissberg, Eliot M., CFP®
Welch, Donald W.
Wells, Matt
Wenzel, George J.
Wetherby, Debra
Weybright, Jason M.
Weymouth, Tiffany E., CFP®
Welker, Lance
White, Herbert C., CFP®, MBA
White, Jack D., CFP®
Wilder, David D., CFP®, MST, CTFA
Wilkerson, Michael
Williams, Jeff
Williams, Karen
Williams, N. Dexter, Jr.
Williams, Mike
Wilson, Andrew L.
Wilson, James
Wilson, Mark
Wilson, Mark, APA, CFP®
Wilson, Steven
Win, Maung H., CFP®
Winston, Robert L.
Wixson, William
Wolff, C. Eric
Wood, Ruth Del Nero, CFP®
Woods, Kevin R., CFP®
Woolfolk, Rick
Woolverton, N. Cameron, CFP®
Wright, Angela
Wyman, Tim, CFP®, JD
XY Planning Network
Yahneke, Dale E., CFP®
Yankee, Jon P., MBA, CFP®
Yang, Chue and Mai
Yankee, Jon P., MBA, CFP®
Yoo, Jane
Yurman, Herman W.
Zaat Hetelle, Jennifer A., CFP®
Zak, Richard
Zaloudek, Charles & Jane
Zeidner, Lewis P.
Zeiger, Sheldon M., CFP®
Zussman, Wayne B., MBA, CFP®

FPA CHAPTERS

FPA of...
National Capital Area $245,320
NorCal Conference $31,000
Philadelphia Tri-State Area $30,000
Dallas/Fort Worth $22,682
Monterey Bay $18,888
Charlotte $15,595
Minnesota $14,425
East Bay $11,928
Massachusetts $10,100
Greater Indiana $10,000
the Suncoast $10,000
New Jersey $7,850
Houston $7,500
Greater Phoenix $7,115
San Francisco $7,000
Los Angeles $6,000
New York $5,050
Silicon Valley $5,000
Georgia $2,885
Central Pennsylvania $2,500
Santa Ana $2,500
Central Florida $2,177
Illinois $2,000
Orange County $2,000
Puget Sound $1,200
New Mexico $1,066
Greater New Orleans $1,040
Kentuckiana $1,000
Miami-Dade $1,000
Northeastern New York $1,000
Oregon & SW Washington $1,000
San Diego $1,000
SW Florida $1,000
the West Valleys (CA) $1,000