MEET OUR 2018 OUTSTANDING MEMBER AWARD WINNERS

BARRY GLASSMAN, CFP®

2018 PLANNER OF THE YEAR AWARD

Barry Glassman is founder and president of Glassman Wealth Services®, LLC, where he leads a team of financial planning and investment professionals that manage over $1 billion for high-net worth families and foundations in 22 states.

While his name appears on most top financial professional lists such as Barrons, Washingtonian and Washington Business Journal, he and his team are most proud of the Best Places to Work accolades from Inc Magazine, Washingtonian and Washington Business Journal, which ranked Glassman Wealth the 2016 best small company to work for in the Metropolitan DC area.

Barry likes to hire smart and experienced talent, but has built the Glassman Wealth team based on curiosity; believing that those who constantly question and want to know more will best serve the multifaceted approach to financial planning and wealth management.,

As a lifelong learner, Barry has a passion for educating clients and investors. He was selected by *CNBC.com* for their elite Financial Advisor Council and is a regular contributor to *WTOP, Forbes.com, Financial Planning* and other media outlets.

He also contributes financial commentary to *The Wall Street Journal*, *Washington Post, The Washington Business Journal, Business Week, Kiplinger's Personal Finance, The Associated Press, Bloomberg, The International Herald Tribune*, and *USA Today.* He has appeared on several national television programs to include *Wall Street Week with Louis Rukeyser, World News Tonight with Peter Jennings, CNBC* and *Bloomberg News*.

Barry is proud of his history with the Financial Planning Association, having served as the Treasurer during the merger of the International Association for Financial Planning and two chapters of the Institute for Certified Financial Planners. He is past-Chairman of the National Financial Planning Association's Tax Sub-Committee and past-president and Chairman of the Financial Planning Association’s National Capital Area Chapter.

Outside of financial planning, Barry is passionate about giving back. He has helped to raise millions of dollars for charitable organizations including the National Brain Tumor Society, World Central Kitchen, Hope Connections and Pediatric Hospice.

AWARD WINNER CRITERIA

The criteria for the Leadership Awards were developed in 2003 and refined by subsequent committees. Each year these Awards are presented to the individuals who have been nominated by the members and selected by the Award Selection Committee.

1) Life Time Achievement Award
   a) Tenure with the FPA or predecessor organizations (IAFP, ICFP) for 10 years or longer
   b) Recognized for service to the organization or profession
   c) Local or National Organizations such as:
   e) CFP Board
   f) College of Financial Planning
   g) Current Members of the FPA (but exceptions can be made for retired members)
2) Norma Severns Award for Leadership (formerly Outstanding Service)
   a) Extraordinary Efforts on behalf or for the benefit of the Local or National FPA or Predecessor Organizations
   b) Service performed within last 5 years.
   c) Must be current FPA members
   d) Board work
      i) Committee work (Retreat, Symposium, Gala, Special Committee work Etc.)
      ii) Chapter Administration
      iii) Contribution to monthly meetings
      iv) Contribution to National Retreats
      v) Advancing the FPA's mission statement locally or nationally
      vi) Financial Planning Practice Recognition
3) Planner of the Year
   a) Achievement recognizable with 1-5 years
   b) Current FPA Members
   c) Promoting Financial Planning Profession
   d) Community/Charitable Work
   e) Media recognition
   f) Mentoring
   g) Innovative Financial planning techniques/practice management
   h) Individual or Firm Recognition

Not all Award winners will meet all of the criteria, but an attempt is made to try to find the best fit.

THANK YOU AWARD SELECTION COMMITTEE

Our Award Selection Committee accepted nominations from the FPA NCA Members in order to choose our Outstanding Award Winners. Our FPA NCA Treasurer, Chris Rivers, CFP® chaired the Selection Committee. Selection Committee Members included FPA NCA President, Bryan Beatty, CFP®, FPA NCA President-Elect, Howard Pressman, CFP®, FPA NCA Secretary, Parker Trasborg, CFP®, FPA NCA Sponsorship Director, Rose Price, CFP®, as well as FPA NCA Executive Director, Peggy Nelson.

KEN ROBINSON, CFP®

2018 NORMA SEVERNS AWARD FOR LEADERSHIP

As President and founder of KCR Wealth Management, Ken Robinson is dedicated to providing independent, fee-only advice to his clients. He specializes in investment management and advanced financial planning for individuals, families, trusts, and business executives. As a fiduciary advisor, Ken provides unbiased advice that serves the best interests of clients.

Ken is a CERTIFIED FINANCIAL PLANNER™ practitioner with over two decades of experience. He builds and manages investment portfolios that are carefully designed to meet the unique needs and goals of each client. He also develops retirement, estate, and tax planning strategies for his clients as part of their ongoing wealth management services.

Ken graduated from the Virginia Military Institute in 1990 with a Bachelor of Arts degree in Economics. He earned his Master of Science degree in Finance from Georgia State University in 1998 and he is a former adjunct professor for Virginia Commonwealth University's CERTIFIED FINANCIAL PLANNER™ certificate program. Ken's expertise is regularly sought out by the press. He has been quoted in the *Wall Street Journal, Washington Post, Investment News*, and various other publications.

Ken is a well-respected and trusted member of the financial planning community. He is consistently voted by his peers as a Top Financial Advisor in both *Washingtonian* and *Northern Virginia Magazine*. He previously served as Chairman of the Board of Directors for the Financial Planning Association of the National Capital Area. In addition to his leadership roles, Ken also participates in pro bono financial planning efforts and financial literacy programs in the greater Washington, DC community.

Outside of the office, Ken enjoys spending time with his family, golfing, fishing, and traveling. Prior to entering the financial planning field, Ken taught high school economics and coached cross country, wrestling, and track and field.

ELEANOR BLAYNEY, CFP®

2018 LIFETIME ACHIEVEMENT AWARD

Well-known as a conference speaker and frequently quoted in the news media, Eleanor Blayney, CFP® has played a pioneering role in building and shaping the financial planning profession.

Until her recent retirement, Blayney was the Special Adviser on Gender Diversity for the CFP Board Center for Financial Planning, where she has been a guiding force behind the Certified Financial Planner Board of Standards' (CFP Board) Women's Initiative (WIN) to address the industry's "feminine famine." In December 2017, she created the "Eleanor Blayney Gender Diversity Fund" at the CFP Board Center for Financial Planning to continue the work of promoting gender parity in the financial planning profession.

On behalf of the WIN Advisory Panel – comprising leaders in the area of women in financial services – Blayney authored *Making More Room for Women in the Financial Planning Profession*, a 2014 white paper which presents the findings of a comprehensive research study on why there aren't more women CFP® professionals, and offers recommendations to help attract more women to the profession.

For 8 years, Blayney served as CFP Board's Consumer Advocate, working to educate the public on making smart financial moves and the value of financial planning. The author of *Women's Worth*, a book about how women can make the most of their financial lives, Blayney worked with individual clients for more than twenty years to help them articulate and plan for their financial goals. As the only woman partner in a four-partner firm, Blayney drew upon her female intuition, communication strengths, and facility for sustaining relationships to help build a wealth management firm that has served hundreds of clients in the Washington, D.C. metro area and around the country.

In 2015, Blayney was among 20 financial advisors and industry executives honored on *InvestmentNews*' inaugural "Women to Watch" list.

Blayney holds a number of degrees and designations. She earned an MA in English Literature from the University of Cambridge UK and an MBA from the University of Chicago. She has been a CERTIFIED FINANCIAL PLANNER™ professional since 1990.

THE NORMA SEVERNS AWARD FOR LEADERSHIP
Award Winner Featured on Page 3

Who was Norma Severns and Why do we Honor Her Memory with this Award?

Some of our members have asked why we have an award named in memory of Norma Severns. We want to offer this information and understanding of Norma, and why this Award has been designated in her memory.

Norma Severns started her career as a nurse. After 27 years of leadership in hospitals, she saw and heard firsthand how most people weren't preparing for their lives after work - either through savings and investing or through insuring their lives or health appropriately. Her passion for caring for others led her to the CFP® and then as a plan writer for Alex Armstrong in 1986.

Norma introduced the idea of long-term care insurance to the financial planning process in 1989, took on her own clients in the '90s and eventually became Alex's partner, leading the charge at Armstrong, MacIntyre & Severns.

Her need to care and mentor quickly extended to FPA, where she served on our board for several years. Two weeks after her tenure as 2003 FPA NCA president started, she was diagnosed with pancreatic cancer, and she passed away five months later at 62, just as she was coming into her own as a chapter leader.

Norma's planning leadership and aggressive pursuit of excellence, compassion, and diligence in planning are what we find in the winners of the Norma Severns Leadership Award.

Past Award Recipients

Financial Planner of the Year Award

Elissa Buie, CFP – 2001
Eleanor K. H. Blayney, CFP – 2002
Dennis M. Gurtz, CPA, PFS, CFA, CFP – 2003
Anne Uno, EA, CFP – 2004
Mark Johannessen, CFP – 2005
Timothy W. Jones, CFP, MPA – 2006
Stephen E. Bingham, CFP – 2007
Richard E. Vodra, JD, CFP - 2008
Marjorie L. Fox, JD, CFP - 2009
Helen Modly, CFP - 2010
Michael E. Kitces, -2011
MSFS, MTAX, CFP, CLU, CHFC, RHU, REBC, CASL, CWPP
Steven A. Starnes, CFP® - 2012
Jon P. Yankee, MBA CFP® - 2013
Lisa A. K. Kirchenbauer, CFP®, RLP® - 2014
Howard Pressman, CFP® - 2015
M. David Goldstein, CFA, CFP® - 2016
Emily M. Chiang, CFP® - 2017

Past Award Recipients

Norma Severns Leadership Award

Paul Juergensen, CFP – 2001
Glenn G. Kautt, CFP, EA – 2001
Deborah E. Voso, CFP – 2001
Karen P. Schaeffer, CFP – 2002
Stephan Q. Cassaday, CFP, CFS – 2003
Gregory D. Sullivan, CFP – 2004
Barry Glassman, CFP – 2005
Tracey A. Baker, CFP – 2006
Judy L. Redpath, CFP – 2007
Gary Altman, JD, CFP - 2008
U. Calvin Brown, MST, CFP - 2009
Mark Johannessen, CFP - 2010
Brian T. Jones, CFP – 2011
Christine M. Parker, CFP® - 2012
Michael R. Kalas, CFP®, AIF® - 2013
Marguerita M. Cheng, CFP®, CRPC® - 2014
Eric Hess, CFP®, CRPC® - 2015
Ryan M. Fleming, CFP® - 2016
Kathleen Sindell, PhD - 2017

Lifetime Achievement Award

Alexandra Armstrong, CFP – 2001
Robert Albertson, CFP – 2002
David S. Dondero, CFP – 2003
John A. MacIntyre, CFP – 2004
Lynn Hopewell, CFP – 2005
L. Edward O'Hara, Jr., CFP, EA – 2006
Patricia P. Houlihan, CFP – 2007
LeCount R. Davis, CFP - 2008
(Hoppy) Clyde G. Hohenstein, CFP - 2009
Margaret M. Welch, CFP - 2010
Karen P. Schaeffer, CFP – 2011
W. Thomas Curtis, CFP® - 2012
Timothy W. Jones, CFP® - 2013
Gary Altman, JD, CFP® - 2014
Marjorie L. Fox, JD, CFP® - 2015
Glenn G. Kautt, CFP® - 2016
Elissa Buie, CFP® - 2017