MEET OUR 2019 OUTSTANDING MEMBER AWARD WINNERS

ALEXANDRA ARMSTRONG, CFP®, CRPC®

2019 PLANNER OF THE YEAR AWARD

Alexandra Armstrong, **CFP®**, was the first person certified as a financial planner in Washington, D.C. (1977). She serves as chairman of Armstrong, Fleming & Moore, Inc. a financial planning firm she founded in 1983 in Washington DC. Alex's broker dealer affiliation is Commonwealth Financial in Waltham, Massachusetts.

In 1985 Alex was elected the first female chairman of the International Association for Financial Planning (now Financial Planning Association). In 2004 she was the first woman to receive the P Kemp Fain Jr. Award* by the Financial Planning Association. In March 2016, she was awarded the first Women to Watch Lifetime Achievement Award** by Investment News. This award is now given annually and is called the Alexandra Armstrong Lifetime Achievement Award

Alex has been involved with several non profit organizations over the years. She is past chairman of the Foundation for Financial Planning (2000) and continues to serve on that board. In 2014, she received the Lifetime Achievement award from the Invest in Others Charitable Foundation for her work with the Foundation for Financial Planning.

She was the first female president of the Boy Scouts of America National Area Council (2000) and chaired the investment committee for Reading is Fundamental. She currently serves on the DC Police Foundation board.

Alex co-authored a book for widows called "On Your Own: A Widow's Passage to Emotional and Financial Well-Being" (Fifth Edition 2012). She is currently working on a book for women facing retirement.

**The P. Kemp Fain Jr. Award recognizes an individual who has made outstanding contributions to the financial planning profession. Nominees for the award are professionals who have made outstanding contributions to the financial planning profession in the areas of service to society, academia, government, and professional activities.*

***The 2015 Women to Watch Lifetime Achievement Award celebrates pioneers in the world of financial planning. It recognizes women who have had long careers as advisors, a track record of leadership in the profession and/or charitable organizations, and a demonstrated commitment to services as a role model or mentor to other women. It also acknowledges women who have earned the admiration and respect of their peers.*

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, Parker Trasborg, CFP® chaired the Selection Committee. Selection Committee Members included FPA NCA President Elect, Chris Rivers, CFP®, FPA NCA Secretary, Rose Price, CFP®, FPA NCA Membership Director, Susan Chesson, CFP®, FPA NCA Past President, Brian Jones, CFP®, as well as FPA NCA Executive Director, Peggy Nelson.

DANIEL P. LASH, CFP®, AIF®

2019 NORMA SEVERNS AWARD FOR LEADERSHIP

Dan has been active in the profession since 1996, is a partner at VLP Financial Advisors and recently celebrated his 20th anniversary with VLP. Dan works with individuals and families to help them create and pursue their financial goals. He advises clients on their investments, retirement, insurance, and estate planning needs. He also works with small businesses to help them navigate their employer sponsored retirement plans and understand their succession options and insurance needs.

Dan is proud of the advocacy work he has done for the financial planning profession throughout his career. He served on the Financial Planning Association National Capital Area (FPANCA) board for 9 years, was the 2016 president of FPANCA, and continues to participate in the annual FPA Career Day, both as an interviewer and speaker, sharing his knowledge of the industry and the process of becoming a successful advisor with upcoming college graduates. Dan also served on the FPA's Alliance Forum committee, which created national executive director guidelines (now available to all chapters) and created the Allied Professionals board position, in an effort to help the chapter develop relationships with other professional associations.

Dan has been named one of Northern Virginia Magazine's Top Financial Professionals for the last eight years as well as being named one of Washingtonian Magazine's Top Financial Advisors for the past seven years. He has been quoted in *Financial Advisor Magazine*, *Forbes* online, *CNBC* online, *Financial Advisor IQ*, *The Fiscal Times*, *Investment News*, *USA Today*, *WealthManagement.com*, *Investing Daily*, *The Washington Post and a many other publications*.

A lifelong resident of Northern Virginia, Dan resides in Fairfax with his wife and their two children, three cats, and one dog. Dan spends his free time attending his children's various sporting events, working out, and as a high school basketball referee.

RICHARD E. VODRA, JD, CFP®

2019 LIFETIME ACHIEVEMENT AWARD

As creator, convener, and communicator, Richard Vodra has helped the financial planning profession explore new directions during more than thirty years of service as an advisor and thought leader.

Since 1995 he has helped organize the Nazrudin Project, a national think tank of planners where Financial Life Planning and other concepts have been developed and spread to the wider financial community. He served for many years on the planning committee of the ICFP/FPA Mid-Atlantic Retreat, including one year as Dean of the Retreat.

Vodra's belief that financial concepts are often more complex than they should be led him to develop "The 700% Solution" and "The Lifetime Balance Sheet" as retirement planning tools, presented at an ICFP National Retreat and published in the *Journal for Financial Planning*. His book, *Enough Money*, published in 2002, sets forth these concepts along with his seven essential rules of money.

From 2002-04, Vodra presented his process of opening client relationships – centered on creating solid reciprocal expectations between planner and client – to the Mid-Atlantic Retreat, the FPA National Retreat, a regional NAPFA conference, and Bob Veres' *Inside Information*.

The massive changes that will result from global climate change, real resource constraints, and related issues led Vodra to develop "Worldview Two," his framework for understanding, explaining, and planning for this new world. He is the only planner to speak on peak oil, climate change, and the coming end of growth at FPA national meetings, and was the first financial advisor to speak to the peak oil community. His website is Worldviewtwo.com, where copies of his articles can be found.

Vodra served as Program Chair and President of the Northern Virginia Society of the ICFP, a predecessor organization to the FPA NCA chapter. He received the chapter's 2008 Planner of the Year award. He also received a Heart of Financial Planning award from the National FPA in 2012.

Vodra began work as a financial planner in 1985, receiving his CERTIFIED FINANCIAL PLANNER® professional designation in 1988. He retired from active practice in 2012. Vodra is a graduate of the College of Wooster and the Yale Law School. Married since 2005, Dick and Jane Vodra share four children: Paul, Rachel, Katie, and Rebecca. They live in McLean, VA.

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
Barry Glassman, CFP® - 2018

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
Ken Robinson, CFP® - 2018

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
Eleanor Blayney, CFP® - 2018