MEET OUR 2020 OUTSTANDING MEMBER AWARD WINNERS

CAL BROWN, CFP®, MST

2020 LIFETIME ACHIEVEMENT AWARD

Cal is a financial advisor in Savant's McLean, VA office, is a member of the Advisory Team, and has a membership interest in Savant. He is a member of the Investment Committee and is responsible for managing all aspects of the financial planning and investment process for Savant's clients. Cal routinely meets with clients, advisors, portfolio managers, and planners to determine and coordinate effective planning, investment, and tax strategies.

Cal has been working in the financial services industry since 1984. He is the author of the book, *When Life Strikes: Weathering Financial Storms*. Cal received his master of science in taxation (MST) at American University in Washington, D.C., and graduated from the University of Arkansas with a bachelor's degree in business administration. He is a CERTIFIED FINANCIAL PLANNER™ professional and was an adjunct professor in the MST program at American University, teaching the estate planning course. Cal is a member and past chairman of the Financial Planning Association-National Capital Area (FPA-NCA).

The Washingtonian and *Northern Virginia* magazines named Cal as one of the top financial planners in the greater Washington, D.C. metro area. Three of his professional articles have been published in the *Journal of Financial Planning*, and he has written articles appearing in *Bloomberg Wealth Manager* and *Financial Planning* magazines. He has appeared on CNBC, Fox 5 D.C., the PBS "Nightly Business Report," WAVA-FM (Washington, D.C.), and News Channel 8 in Washington, D.C. He has been quoted in the *Wall Street Journal*, *Kiplinger's Personal Finance* magazine, *Smart Money*, *Newsweek*, *U.S. News and World Report*, CNNfn, *Financial Planning* magazine, *Mutual Funds* magazine, and *InvestmentNews*.

Prior to its combination with Savant, Cal was an advisor with The Monitor Group for 12 years. Cal joined Team Savant in June 2012.

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 President Elect, Rose Price, CFP® chaired the Selection Committee. Selection Committee Members included FPA NCA Chairman, Chris Rivers, CFP®, FPA NCA 2020 President, Parker Trasborg, CFP®, Treasurer, Kirk Taylor, CFP®, FPA NCA Past President, Howard Pressman, CFP®, as well as FPA NCA Executive Director, Peggy Nelson.

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
4) Emerging Leader Award
   a) Planner with 3-5 years experience
   b) Contribution to the NextGen group
   c) Participation at the local FPA NCA chapter- attending Symposium events and luncheons
   d) Current FPA member
   e) Community/Charitable work
   f) Promoting Financial Planning profession

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

HOWARD PRESSMAN, CFP®

2020 NORMA SEVERNS AWARD FOR LEADERSHIP

Howard is a financial planner and partner at Egan, Berger and Weiner, an independent financial planning firm located in Tyson's Corner, VA. Howard is a Certified Financial Planner™ and the past President and Chairman of the Financial Planning Association, National Capital Area Chapter. Howard has served on the ONE FPA Transition Committee for the National Financial Planning Association organization for the past year, and will continue in this role during 2020.

Howard is a frequent lecturer and teacher and has been quoted in articles by such media outlets as CNBC and the Fiscal Times. As a writer, he was a regular contributor to Market Watch's Retirement Weekly newsletter and has written articles for the CFP® Board's consumer newsletter. Howard has been a guest on WUSA Channel 9 and News Channel 8 and has twice been recognized as one of the area's "Top Money Advisers" by Washingtonian Magazine and as Financial Planner of the Year for 2015 by the Financial Planning Association, National Capital Area chapter.

Howard lives on Capitol Hill with his wife Erica and their daughter Tali.

THE NORMA SEVERNS AWARD FOR LEADERSHIP
Award Winner Featured Above

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.

MELISSA G. SOTUDEH, CFP®, AIF®

2020 PLANNER OF THE YEAR AWARD

As Melissa Sotudeh begins her 14th year in the financial planning industry (and her 14th year as a member of the FPA), she has seen major changes in the industry. With her characteristic enthusiasm and drive, she has taken an active role in shaping its future. As Abraham Lincoln said, "the best way to predict the future is to create it," and in her career Melissa has shown her willingness to accept this challenge time and time again, in her firm, the industry and the community.

Many of you know Melissa from the four years she spent on the FPA Board of Directors. During this time, she served on the Pro Bono, Programs, Sponsorship and Social committees.

Today she works at Halpern Financial as the Director of Advisory Services, where she leads the advisory team in establishing processes and best practices to ensure the firm's clients benefit from consistent service and coordinated advice. Melissa also continues to work as an advisor helping clients as they transition through life stages, from planning for children's college expenses to maximizing financial opportunities as an empty-nester.

She has over twenty years of experience in a variety of business and community service activities. She began her career at the World Bank, and then went on to serve in the Office of the Executive Director at The US Securities and Exchange Commission for five years.

In 2010, Melissa completed the Certified Financial Planner (CFP®) designation, and last summer she earned the Accredited Investment Fiduciary® designation. Melissa has also been an active volunteer with CFP Board for several years and is now a member of the CFP Board Council on Examinations.

In addition to being a leader in our community, Melissa is quite active in promoting financial education in the local community. She has a passion for college planning since her two children went through the college search process, and presents her "Late Stage College Funding" talk to D.C.-area parents several times a year with a college admissions counselor. She has written several articles about college funding, and is the author of *Find Your Financial Safety School*, a choose-your-own-adventure ebook.

She has also promoted financial literacy in the region through one-on-one counseling with Capitol Hill staffers and her leadership role on the steering committee for the Metro Washington Financial Planning Day 2011 and 2013.

Melissa spends her spare time with her family in Bethesda or training for marathons. She is an avid runner and in 2017, she completed the Boston Marathon.

KELLY McNERNEY, CFP®

2020 EMERGING LEADER AWARD

Kelly McNerney, CFP® joined FJY Financial as an Associate Financial Advisor, and since then she has racked up an impressive string of accomplishments: she passed the CFP exam in March of 2016, completed the remainder of the requirements for the designation later that year, and was promoted to Financial Advisor in January 2018. Kelly excels at building strong client relationships, and as a Financial Advisor she is responsible for actively managing client portfolios, developing investment strategy decisions, and supervising Associate Advisors. She also manages FJY's highly successful internship program and is responsible for recruiting, training, and mentoring two students every summer. As a member of FJY's investment committee, Kelly performs research related to investment objectives and contributes towards the firm's investment decision-making process and due diligence. Kelly is also a member of the firm's Financial Planning Committee, a committee focused on furthering the knowledge of our Financial Advisors and staying abreast of the issues that our clients are currently facing.

Kelly is very active in the Greater Reston Chamber of Commerce as Secretary of the Young Professionals Committee, and just received their ACE award nomination for Young Professional of the Year. She has also been named to the FPA NCA Board of Directors for 2018, and is a key component of their local NexGen chapter.

A cum laude graduate of William Paterson University (WPU), Kelly was a student member of the Financial Planning Association and President of the William Paterson FPA Student Chapter. During her senior year, she was awarded a TD Ameritrade Institutional NextGen Scholarship, which allowed her to visit the New York Stock Exchange and ring the closing bell.

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
Alex Armstrong, CFP® - 2019
Melissa Sotudeh, CFP®, AIF® - 2020

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
Daniel P. Lash, CFP® - 2019
Howard Pressman, CFP® - 2020

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
Richard E. Vodra, CFP® - 2019
U. Calvin Brown, CFP®, MST - 2020

Emerging Leader Award

Kelly McNerney, CFP® - 2020