

2026
Advisory Council



Official Roster

2026 ADVISORY COUNCIL & WORKING GROUPS

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Cary Carbonaro, CFP®

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Advisory Council

BOB GLOVSKY, JD, CFP®

Chair



Bob Glovsky is a retired financial planner with over 45 years of experience in comprehensive wealth management. A past Chair of both the Certified Financial Planner Board of Standards and its Board of Examiners, he has played a major role in shaping professional standards for the financial planning field.

Bob is Director Emeritus of Boston University's Financial Planning Program, where a scholarship fund established in his name supports diverse and underserved aspiring planners.

Repeatedly recognized as one of the nation's top advisors by Worth, Mutual Fund, Barron's, and Boston Magazine, Bob has been widely featured in major media and co-hosted financial education programs on radio and television.

He has also been honored for his community service, including receiving the Financial Planning Association's Heart of Financial Planning Award and Boston University School of Law's Silver Shingle Award.

He is a graduate of Dartmouth College and holds a JD and LLM from Boston University School of Law.

MEG CARPENTER

Vice Chair



Meg Carpenter is CEO and Co-Founder of Ficomm Partners, an award-winning growth marketing firm working alongside financial advisors, financial advisory firms, and wealth management platforms at every stage of growth.

Through Ficomm's proven strategic marketing framework and advisor marketing coaching programs, Meg has had a seat at many executive tables working alongside leadership teams to tackle their most pressing growth challenges.

Meg and her all-female leadership team bring a deep understanding of growth strategy and are proud to have been recognized across the wealth management industry for their expertise.

Meg is honored to be on the Board of Trustees for the Foundation for Financial Planning and sits on the Board of Absolute Engagement.

**Youth
working group**

KAREN P. SCHAEFFER, CFP®

Chair



Karen P. Schaeffer is the Managing Member and Co-founder of Schaeffer Financial LLC and has advised clients for more than forty years, serving professional women, Foreign Service Officers, foreign nationals, and Federal employees. She is a CFP professional and a recognized leader in the field, having chaired both the Financial Planning Standards Board and the CFP Board.

A frequent speaker on global financial planning, Karen has presented at international conferences and led programs for organizations such as The World Bank, the U.S. Treasury, the IMF, FDIC, and the Department of State. She has also taught at the College for Financial Planning, George Washington University, and multiple professional training organizations, often designing continuing education courses for financial professionals.

Her writing has appeared in major industry publications, and she has been featured in The Washington Post, The Wall Street Journal, The New York Times, and Money Magazine.

NANCY KISTNER, CFP®

Vice Chair



Nancy Kistner is Managing Director and Wealth Strategy Executive at Bank of America Private Bank, leading business strategy and Wealth Strategists across New York City and the West Division.

With deep expertise in tax, retirement, estate, business succession, and multigenerational wealth planning, she helps families create cohesive and purposeful financial strategies.

She previously led financial planning at Citi Private Bank and MetLife and has held prominent industry leadership roles, including Chair of the CFP Board of Directors and member of the FPSB Board.

Nancy is also the Founder and Former Chair of the CFP Board's Women's Initiative (WIN), supporting the advancement of women in financial planning.

She holds a B.A. in economics from UCLA and is a CERTIFIED FINANCIAL PLANNER™ professional.

CARY CARBONARO, CFP®



Cary Carbonaro, CFP® is an award-winning financial planner with more than 25 years of experience and serves as Managing Wealth Advisor and Women and Wealth Ambassador at Ashton Thomas.

She leads a multimillion-dollar planning practice and is known for empowering women through financial education and guidance.

Her background includes leadership roles at ACM Wealth, Goldman Sachs, and United Capital, where she founded the Women's Leadership division and earned multiple firmwide honors. In 2025, she was named InvestmentNews' DEI Trailblazer of the Year.

She is the bestselling author of *The Money Queen's Guide* and *Women and Wealth* (Wiley, 2025), and has long served as a CFP® Board Ambassador, frequently representing the profession in national media.

A six-time Investopedia Top 100 Advisor and the first woman appointed to the NASDAQ Advisor Council, she is also an active philanthropist—founding the Women's Giving Alliance, endowing a Women in Business scholarship at SUNY Cortland, and supporting initiatives that advance women in the financial profession.

KATIE CULLEN, CFP®



Katie Cullen, CFP®, is the Head of BlackRock Business Consulting, where she helps advisors accelerate growth through strategic consulting, industry insights, and leadership development.

She leads engagements, delivers thought leadership, and oversees the award-winning Emerging Leader Lab, which prepares about 100 rising leaders each year to advance within their firms and the broader industry.

With more than 25 years in financial services, Katie has held leadership roles in strategy, innovation, and organizational development, including positions at Schwab Advisor Services and a large RIA, as well as running her own consulting firm.

She earned a BA from the University of Minnesota, served 11 years as an Officer in the U.S. Army Reserves, and contributes to the profession through her roles with the CFP Board's Workplace Advisory Development Group, Brighter Children's board, and American Corporate Partners.

She lives in Minneapolis with her husband and three children.

MARY BETH FRANKLIN, CFP®



Mary Beth Franklin, CFP® is one of the nation's leading authorities on Social Security, Medicare, and retirement income planning.

An award-winning journalist and financial planner, she delivers in-person and virtual education programs for consumers and financial professionals and hosts the public television program Social Security & You. She is also the author of *Maximizing Social Security Benefits*.

A former contributing columnist for InvestmentNews, her On Retirement column earned the EPPY Award for Best Business Blog, and she received the Women's Institute for a Secure Retirement's Hero Award for her advocacy on behalf of women's retirement security.

She also served on the CFP Board's Women's Initiative Council, promoting gender and racial diversity in the financial planning profession.

Earlier in her career, she was tax and retirement editor at Kiplinger's Personal Finance and editor of its annual Retirement Planning Guide, after beginning her career as a Capitol Hill reporter for United Press International. A frequent guest on radio and television, she also hosted the long-running podcast *The Retirement Repair Shop*.

ANNIE HAEHL



Annie Haehl is the Senior Director of field talent acquisition and development at Northwestern Mutual, where she has the privilege of leading, along with her team, our recruit to retire advisor, or talent development strategy, inclusive of Northwestern Mutual's internship program, new advisor, and career advisor growth strategy.

She firmly believes in the power of learning and development as a strategic asset, emphasizing data-driven co-creation—'by the field, for the field'—to enhance and optimize business outcomes. This is currently being realized through the modernization of our 60+ year old internship program, a new advisor growth strategy, and an elevated career advisor experience.

She brings to the Talent Acquisition and Growth team 13 years of industry experience in advisor and leadership learning and development strategy. Prior to Northwestern Mutual, she led advisor teaming and development initiatives at MetLife, MassMutual (as a result of the MetLife acquisition), and Guardian Life.

Annie was midwestern born and raised, but calls Charlotte, North Carolina home. She spends a lot of time with her dog, Pennie and boyfriend, Andy enjoying the outdoors. Also, if you are a national park enthusiast, please tell me about your favorite park!

DANNY HARVEY, MBA



Danny Harvey, MBA is a portfolio management professional and finance educator with extensive experience in asset management, global energy trading, and financial analysis.

He spent more than a decade at Invesco, where he managed and traded over \$70 billion in assets across multiple sectors and currencies, conducted market and credit research, developed portfolio strategy, and produced economic commentary for executives and shareholders. His experience also includes trade control analysis at Barclays and project and systems work within Invesco's institutional transfer agency.

Danny is currently a finance faculty member at Prairie View A&M University and an adjunct professor at DeVry University, teaching personal finance, business, economics, and data analysis.

He holds an Executive MBA in Global Energy from the University of Houston and a B.S. in Economics from Texas A&M University, along with FINRA Series 7 and multiple insurance licenses.

He has been recognized in Who's Who Houston in Black Houston and remains active in numerous professional and community organizations, including the American Association of Blacks in Energy, the National Black MBA Association, and the Houston Livestock Show and Rodeo.

MARK JOHANNESSEN, CFP®



Mark Johannessen, CFP®, AIF® is a Partner and Private Wealth Manager with more than 30 years of experience helping individuals, families, and business owners build and maintain comprehensive financial plans.

His work spans investments, tax planning, risk management, retirement, employee benefits, and estate planning. Before joining Creative Planning, he was a founding employee of a large independent advisory firm, advising clients across a broad range of financial matters.

He holds a B.S. in economics and political science from the University of Utah and is both a CERTIFIED FINANCIAL PLANNER™ professional and Accredited Investment Fiduciary®.

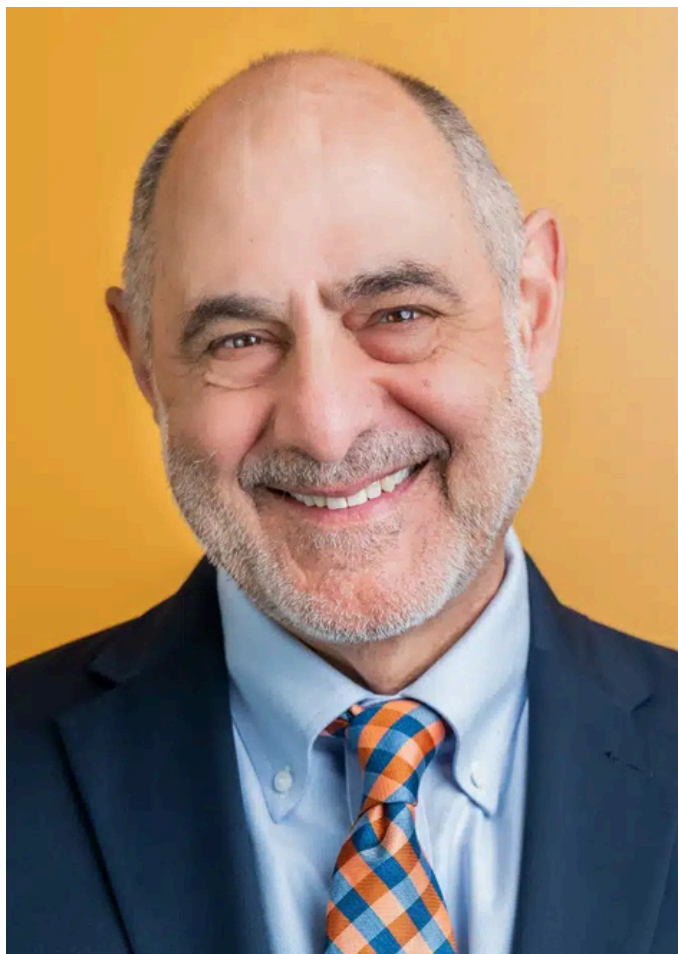
A longtime advocate for pro-bono financial planning, he received the Financial Planning Association's Heart of Financial Planning Award in 2024.

Active in his community, he has held leadership roles with organizations including the Catholic Business Network of Montgomery County, Safe Shores – The DC Children's Advocacy Center, and the Gonzaga Fathers Club.

He currently serves on the CFP Board Center for Financial Planning's Advisory Committee and Development Committee, as well as the Finance Committee at Gonzaga College High School.

Mark lives in Rockville, Maryland, with his family.

ROBERT POWELL, CFP®



Robert Powell, CFP®, RMA® is an award-winning financial journalist and retirement expert whose work has appeared in MarketWatch, USA Today, The Wall Street Journal, TheStreet, and AARP.

He serves as editor-in-chief of the Investments & Wealth Institute's Retirement Management Journal and is co-founder of finStream.tv, a platform delivering short-form personal finance education.

He also teaches in the Financial Planning Association's Online Elder Planning Specialist program and partners with Plan for Life Now.

He has hosted several industry podcasts, including Yahoo! Finance's Decoding Retirement, and previously led Retirement Daily on TheStreet.

His earlier career includes key roles in curriculum development for retirement programs at Boston University and Salem State University, as well as leadership positions in financial publishing and education at DALBAR.

Powell holds a bachelor's degree from Marquette University and a master's degree in journalism from Boston University, where he also completed the CFP® board-registered financial planning program.

Active in community service, he has served on numerous nonprofit and civic boards.

**College Students
working group**

SHERRI TROMBLEY

Chair



Sherri Trombley is Director of Business Consulting & Education for Schwab Advisor Services. She oversees the strategic direction for advocacy of the RIA industry with colleges and universities around the country.

Sherri manages Schwab's University Grant and RIA TalentAdvantage (RIATA) Student Scholarship programs – building partnerships with universities to cultivate the next generation of talent.

Under her leadership, the University Grant Program has awarded more than \$19M in grants to universities and institutions across the United States. The RIATA Scholarship program received an industry award for outstanding achievement in diversity, equity, and inclusion from WealthManagement.com.

Sherri also serves as a business liaison for the Schwab SIE University Partnership program representing the firm at college campuses.

MAXIM DOLINSKY, PH.D.

Vice Chair



Maxim Dolinsky serves as a Clinical Assistant Professor and Director of Undergraduate Finance Professional Development at the University of Florida's Warrington College of Business.

In this role, he oversees student mentorship, employer and alumni engagement, and career-readiness programming, including coordinated corporate site visits across major financial hubs such as Miami, New York City, Atlanta, Dallas, Orlando, and Tampa.

He teaches Business Finance and Intro to Financial Planning, bringing together practical industry insight and academic rigor shaped by prior faculty appointments at the University of Delaware and Central Michigan University.

He holds a Ph.D. in Finance, an MBA, and a B.S. in Industrial Engineering from the University of Florida. His work in teaching and student development has been recognized with multiple honors, including the Student Choice Teaching Award, the Giraffe Service Award, and UF's Ph.D. Teaching Award.

YUSUF A. ABUGIDEIRI, CFP®



Yusuf A. Abugideiri, CFP® is a nationally recognized financial professional, honored by publications including InvestmentNews, Forbes, Washingtonian, and Northern Virginia Magazine. He was also featured in Schwab's Independent Difference Campaign highlighting the value of independent, fiduciary financial advice.

A long-time member of the Financial Planning Association®, he has served in multiple leadership roles within the National Capital Area chapter, including Director of PR, Media Relations, and Communications, and is a graduate of FPA's Residency Program.

His writing includes the cover article "Serving Millennial Clients with a 3-Step Model," and he joined the Journal of Financial Planning Peer Review Board in 2021.

He served on the CFP Board's Workforce Development Advisory Group and previously held positions with the Washington DC Estate Planning Council and Virginia Tech's Pamplin College of Business Recent Alumni Board.

Outside of work, Yusuf enjoys time with his wife, Maegan, and their children, Noah and Rian. His passions include music, sports, movies, sneaker collecting, and fitness—proudly calling himself a certified Peloton addict.

CALEB BROWN, CFP[®], MBA



Caleb Brown, CFP[®], MBA is the co-founder of New Planner Recruiting, where he is dedicated to strengthening the financial planning profession by guiding emerging planners into meaningful careers and helping firms identify and develop top talent.

A passionate advocate for expanding access to financial planning, he has spent his career creating pathways that support the next generation of advisors and improve the client experience across the profession.

Known for his innovative and energetic approach—sometimes literally balancing on a board at his standing desk—Caleb brings enthusiasm and forward-thinking solutions to his work with both candidates and firms.

Outside the office, he can most often be found exploring the outdoors with his wife and children, enjoying time in nature and with family.

LUKE DEAN, PH.D.



Luke Dean is the CFP® Program Director @ Utah Valley University.

He was the primary author/researcher for the CFP® Board Career Path Guide to the Financial Planning profession and creator of the “12 Tribes of Financial Planning”.

Luke has helped build Financial Planning programs at both UVU and William Paterson University in New Jersey.

He has a PhD in Personal Financial Planning from Texas Tech University and Bachelors/Masters degrees from Brigham Young University.

He is married to Angela & has 5 children and loves to play pickleball or coach his kids soccer/basketball teams.

MAC GARDNER, CFP®



Mac Gardner, CFP® has more than 25 years of experience in financial services and specializes in guiding individuals and families through the complexities of their financial lives.

His career includes roles with firms such as TIAA, USAA, Raymond James, and Bank of America, and he now focuses on comprehensive planning for high-net-worth and ultra-high-net-worth clients, including entrepreneurs and business owners.

His expertise spans tax strategy, income and estate planning, and investment management.

Outside of work, Mac enjoys traveling with his wife and three children, cheering on their volleyball, football, and basketball activities, and spending time at home tending to his tropical fruit trees.

SABRINA LOWELL, CFP®



Sabrina Lowell, CFP®, CPCC is the founder of Second Summit Wealth Management and has more than two decades of experience helping individuals, couples, and multigenerational families navigate their financial lives with clarity and confidence.

She specializes in managing concentrated stock positions, structuring equity compensation strategies pre- and post-IPO, guiding attorneys and physicians through executive benefits, and supporting clients experiencing liquidity events, inheritance, or major life transitions.

Sabrina has been recognized as an industry leader, earning honors such as SF Business Times Women to Watch, InvestmentNews 40 Under 40, WealthManagement.com Ten to Watch, and InvestmentNews 20 Women to Watch. She received the national FPA Heart of Financial Planning Award in 2015.

Committed to advancing the profession, she serves as a Dean and mentor for the FPA Residency Program. Locally, she has participated in Leadership San Francisco and serves on the Olympic Club Nominating Committee.

DEBRA RADWAY, CFP[®], MBA



Debra Radway, MBA, CFP[®] is an Associate Teaching Professor in the Department of Finance at Arizona State University's W. P. Carey School of Business, where she has taught since 2016.

A CERTIFIED FINANCIAL PLANNER[™] professional, she is also a trustee and investment advisor with Radway Advisory Services LLC, providing financial planning and trust management for clients nearing or in retirement.

Her academic experience includes faculty roles with Grand Canyon University and Northwestern University's Certified Financial Planner Program.

Prior to academia, Debra served as a wealth advisor with Harris BMO Private Bank, helping clients develop comprehensive strategies in estate planning, retirement planning, investment allocation, insurance, and banking.

Debra holds an MBA in Finance and Economics from the University of Chicago Booth School of Management and a B.S. in Mathematics with a Business minor from Arizona State University's Barrett Honors College

ERIN VOISIN, CFP®



Erin Voisin has worked in the financial services industry since 2005.

She is currently the Managing Director of Wealth Management Services at EP Wealth Advisors where she oversees the financial planning, tax, estate, trust services and retirement plan services offerings.

Erin earned her BS from the University of San Diego, majoring in Business Administration with a minor in Psychology. She also holds a master's degree in accounting.

She is currently a CFP® certificant, Certified Divorce Financial Analyst®, and Enrolled Agent. Erin has been a FPA Pro Bono for Cancer volunteer, co-chairs EP Wealth's Financial Literacy committee and outreach, and has been a founding member and the former Chairwoman of EP Wealth Advisor's Investing in Women initiative.

Erin also assists with the firms internship and externship program. She is a CFP Board Ambassador and was a member of the CFP WIN Council. In 2021, she was an Investment News 40 under 40 recipient.

In her spare time, Erin enjoys spending time with her family, paddle boarding, cooking, and enjoying life at the beach!

Career Changers
working group

PHUONG LUONG, CFP®

Chair



Phuong Luong, CFP® is an educator and financial planner, founder of Just Wealth, and Director of the Boston University Financial Planning Program.

She specializes in financial planning and sustainable investing, informed by her background in public education, nonprofit work, and the study of financial history and systemic inequality.

Her experience includes leading financial counseling programs at a national nonprofit and contributing to the development of Adasina Social Capital's social justice index and ETF.

She has also served on key CFP Board initiatives focused on diversity and education and has written regularly for Morningstar on financial planning and sustainable investing.

She holds a B.A. from Dartmouth College and an M.Ed from Boston University, where she completed the Financial Planning Program and received the Robert J. Glovsky Scholarship.

BILLY WALSH, CFP[®], CDFA[®]

Vice Chair



Billy is an Associate Partner, Wealth Advisor at Corient, working in the San Diego office. He enjoys helping clients give purpose to their wealth. Before entering the financial services industry, he served as an officer in the Navy's helicopter and special warfare communities for over 23 years.

During his last three years, he volunteered as a personal finance instructor and counselor, while completing his CFP[®] studies and participating in the Externship. He then used the Department of Defense SkillBridge program to get his start with Corient.

Billy holds an Executive MBA from the Naval Postgraduate School, an MA in National Security and Strategic Studies from the Naval War College, and a BS in Computer Science from Norwich University.

He holds the CERTIFIED FINANCIAL PLANNER[®], and Certified Divorce Financial Analyst[®] certifications.

Billy was raised outside Boston, MA, and now resides in San Diego with his wife and four children where he enjoys surfing and hiking.

KELLY DIGONZINI, CFP®



Kelly DiGonzini, CFP®, MST leads Beacon Pointe Advisors' insurance, tax, and retirement plan services, helping clients develop comprehensive financial and tax-planning strategies.

She previously worked as a financial planner at MetLife and brings expertise in supporting individuals and small business owners.

She holds a B.A. in Business from Gonzaga University and an M.S. in Taxation from William Howard Taft University, with advanced study in partnership taxation, estate planning, charitable giving, and real estate tax.

Kelly is a CERTIFIED FINANCIAL PLANNER® professional and completed the Personal Financial Planning program at UC Irvine.

A strong advocate for financial education, she served on CFP Board's Women's Initiative (WIN) Council and is a member of Charles Schwab's DAFGiving360 Advisory Council.

She is also a founding member of the Beacon Pointe Women's Advisory Institute and co-author of the international best-selling book *Your Dollars, Our Sense*.

Kelly lives in South Orange County, California, with her husband and three children.

KEDISHA EBANKS, CPA



Kedisha Ebanks is a Financial Advisor and Managing Director at Global Advisor Group.

As a member of the firm's leadership team, she helps shape the strategic frameworks, operating processes, and culture that drive exceptional client experiences, while strengthening organizational effectiveness and talent development.

Rooted in her own transformative journey, Kedisha's approach to financial planning blends empathy, education, and empowerment with practical, actionable tools. She integrates her extensive background in consulting, coaching, counseling, and advisory work to deliver comprehensive guidance that supports long-term financial independence and security.

With more than 25 years of professional experience, Kedisha's career spans global consulting, enterprise transformation, and wealth management. She has partnered closely with senior leadership and led cross-functional teams through complex change, aligning people, processes, and long-term objectives to create sustained impact for corporations, small businesses, and the individuals and families they serve.

Beyond her professional work, Kedisha serves on the board of a nonprofit organization and actively volunteers with causes close to her heart. She is a devoted wife and mother of two daughters and finds joy in traveling, playing board games, and creating meaningful memories with her family.

MIQUEZ HADLEY, CFP®



Miquez (Mike) Hadley joined Edward Jones in 2008 in the St. Louis Headquarters.

Over his career, Mike has held numerous leadership roles focused on growing the firm's branch and regional leadership structure.

Currently, Mike is a senior director for the firm's Workplace business where he is responsible for scaling the products and services offered to local businesses owners and their employees to help them achieve financial fulfillment.

In his role, Mike works directly with all U.S. markets and divisions on developing strategies that drive the firm's business objectives.

Originally from Kenosha, Wisconsin, Mike is a CERTIFIED FINANCIAL PLANNER® professional and serves on the boards of both the CFP Workforce Development Council and the Arizona Black Chamber of Commerce.

He is a frequent speaker on financial planning and workplace solutions for business owners, most recently speaking at the U.S. Chamber of Commerce Foundation's Business Solves conference.

ERICA JAMES, CFP[®], CPA



Erica James, CFP[®], CPA is a Wealth Advisor at Signify Wealth, where she helps clients align their finances with their values through a comprehensive and collaborative planning process.

She draws on her strong technical background in accounting and tax to deliver forward-thinking solutions tailored to each client's needs.

Erica's career includes financial planning roles at SBSB Financial Advisors and Creative Planning, following early experience at PwC in audit, tax, and nonprofit accounting.

She is committed to expanding access to financial guidance and serves as a financial mentor with Britepaths, providing one-on-one support to individuals seeking greater financial stability.

Her leadership in the profession has earned her recognition on the InvestmentNews 40 Under 40 list.

A dedicated advocate for pro bono service, Erica is a trustee of the Foundation for Financial Planning and has trained planners nationwide on best practices for serving underserved communities.

She is also a member of the Journal of Financial Planning Peer Review Board. Erica is a proud graduate of Washington University in St. Louis, where she studied accounting and Spanish.

SHEILA C. LAWRENCE, CFP®



Sheila Lawrence, MALD, CFP®, CAP® is a Partner and Senior Client Advisor whose work centers on estate planning, wealth transfer, and investment management, with a strong focus on philanthropy, impact investing, and financial education for the rising generation.

She helps families clarify values, build financial skills, and support successful multigenerational wealth stewardship.

A CERTIFIED FINANCIAL PLANNER™ professional and Chartered Advisor in Philanthropy®, Sheila serves on CFP Board's Women's Initiative Council and previously served on the Boston Foundation's Professional Advisors Committee and co-chaired its Professional Advisors Network.

She holds a Master of Arts in Law and Diplomacy from The Fletcher School, where she concentrated in international business and trade policy, and began her career in credit risk management at Bear Stearns. She graduated summa cum laude and Phi Beta Kappa from the University of California, Berkeley, with a B.A. in Economics.

Sheila serves on the Boston Board of Thrive Scholars, the Community Advisory Board of WBUR, and the board of the Lexington Community Farm Coalition. She lives in Lexington, MA, with her husband and two children.

ANGIE RIBUFFO, CFP®



Angie Ribuffo, CFP®, RICP®, ChFC®, CDFA®, CLTC®, WMCP® is the founder of Raion Financial Strategies, where she focuses on helping clients prepare for and achieve their self-identified financial goals.

She entered the financial planning profession in 2008 after an early career in nursing and service as a Captain in the U.S. Air Force, where she supported hundreds of military families during Desert Shield/Desert Storm. She later consulted for the Department of Defense, working on financial quality-of-life initiatives on Capitol Hill.

Angie is a nationally recognized advisor and speaker, with writing featured in USA Today, Women in Finance, and the Certified Long-Term Care Digest. She has received numerous honors, including the 2022 Women in Insurance and Financial Services (WIFS) Woman of the Year, InvestmentNews' "See It, Be It" DEI Role Model, and WIFS Women to Watch.

She is also a longtime WIFS leader, serving as National President in 2017–2018 and earning multiple awards for mentorship and professional excellence.

Committed to advancing the profession. Angie is active with The American College of Financial Services as a FinServ Ambassador, facilitates the WIFS Mentorship Program, and is a member of the Anchorage Chamber of Commerce

MELISSA SOTUDEH, CFP®



Melissa Sotudeh is an accomplished financial professional with an extensive background in wealth management.

As Senior Wealth Advisor and Managing Director with MAI Capital Management, Melissa brings a wealth of experience, expertise, and strategic vision to the firm, ensuring that each client receives personalized and comprehensive wealth management solutions.

Her proven track record of delivering tailored financial solutions to high-net-worth individuals, families and companies is a driving force behind her success with clients.

In 2010, Melissa received the Certified Financial Planner (CFP®) designation from the CFP Board of Standards. After several years of service as a volunteer with CFP Board, she was appointed to the 2019 CFP Board Council on Examinations and served as its chair in 2023. In 2019, Melissa earned the Accredited Investment Fiduciary® designation. Melissa was named 2020 Planner of the Year by the FPA National Capital Area.

Melissa maintains an active presence in the financial community, frequently participating as a guest speaker at industry conferences and contributing thought leadership articles and insight to prominent financial publications including syndicated articles for nationwide publications, such as the Wall Street Journal, and has been quoted in Bloomberg, US News and CNBC. She has also appeared as a guest on Sirius XM Radio's "Your Money" and the "Martinis and Your Money" podcast.

LESLIE Y. TABOR



Leslie Tabor is a leader at Charles Schwab Advisor Services, where she sets the strategic direction for enterprise-wide business consulting, education, and talent initiatives serving independent registered investment advisors (RIAs).

With more than two decades at Schwab, Leslie has built and led programs that shape how advisory firms think about leadership, growth, and the future of their businesses.

In her current role, Leslie oversees a broad portfolio designed to help advisory firms strengthen leadership capability, build sustainable talent pipelines, and make confident, long-term strategic decisions.

Her work spans executive education, leadership development, industry advocacy, and next-generation talent initiatives—connecting firm vision, people strategy, and business outcomes. She leads cross-functional teams that translate deep industry insight into scalable programs used by thousands of advisory firms nationwide.

She is passionate about helping advisory firms build enduring businesses by investing in people, clarity of vision, and intentional leadership.

Career Enhancers
working group

BRANDON DIXON-JAMES, CFP®

Chair



Brandon is the President and Co-Founder of Resilient Wealth Management, Inc., a wealth management firm based in Fresno, CA. He and his wife established RWM Inc. around a fundamental theme that has allowed them not only to survive but to thrive in life: resilience.

Brandon has been in the financial services industry since 2004 and brings a wealth of experience to planning for his clients' futures. As a CERTIFIED FINANCIAL PLANNER® Practitioner, he works closely with clients to articulate, identify, pursue, and address their financial goals, developing customized strategies tailored to their unique needs.

He is passionate about giving back to his community. Brandon is an active volunteer in Fresno's underserved areas, a regular presenter of youth financial literacy courses, a member of Kappa Alpha Psi Fraternity, Inc., a volunteer for the CFP Board Center for Financial Planning, and a champion for diversity and inclusion.

A graduate of California State University, Fresno, with a degree in Business Administration and an emphasis in Finance, Brandon is a native of Stockton, California. He and his wife, Nicole, have two children and live an active, healthy lifestyle rooted in family, church, and embracing each moment of life's journey.

CHARLES ADI, CFP®

Vice Chair



Charles Adi, CFP® is a financial planner with more than 15 years of experience helping individuals, families, and business owners build financial security through integrated cash-flow, tax, insurance, and investment strategies.

He is the creator of the Financial Blueprint, a comprehensive planning approach designed to help clients make informed decisions and feel prepared for life's unexpected events.

A graduate of Louisiana State University with a B.S. in Accounting, he began his career at a global accounting firm before transitioning into financial services.

He is a CERTIFIED FINANCIAL PLANNER™ professional and holds Series 66 and Texas Life, Accident, and Health Insurance licenses. In 2020, he launched Aligned Portfolios, an investment platform focused on aligning client values with publicly traded companies.

Active in the community, he participates in organizations including the Financial Planning Association of Houston, the National Association of Black Accountants, and the United Way of Greater Houston. A member of Omega Psi Phi Fraternity Inc. and a supporter of arts and youth initiatives, he regularly contributes his time and resources to civic and nonprofit efforts.

AUDRA BOHANNON



Audra Bohannon is a nationally recognized diversity, equity, and inclusion leader with more than 35 years of experience helping organizations strengthen leadership, culture, and overall performance.

She is the founder of Bohannon Advisory and previously served as a Senior Client Partner at Korn Ferry, advising global companies and coaching leaders at all levels to unlock their full potential.

A sought-after keynote speaker and thought leader, Audra is known for her transformative message that “all people have potential” and her ability to spark meaningful conversations about inclusion, race, and personal leadership.

Her earlier roles include senior positions at Global Novations, Novations Group, and J. Howard & Associates—firms that helped establish the modern DEI consulting landscape.

Her work and insights have been widely featured, including a cover story in Inclusion magazine.

Audra holds a Bachelor of Science in Business from Wayne State University and remains active in shaping inclusive leadership and educational opportunity. She serves on the boards of Community Builders and Accelerated College Experiences (ACE).

FRANK DOBBIN, PH.D.



Frank Dobbin is a professor and leading scholar of organizations, inequality, economic behavior, and public policy. He received his B.A. from Oberlin College and his Ph.D. from Stanford University.

His research examines how organizational practices, legal frameworks, and managerial decisions shape equal opportunity and workplace outcomes.

Dobbin is the author of *Inventing Equal Opportunity*, which explores how corporate personnel managers defined and implemented anti-discrimination practices, as well as several influential books in economic sociology addressing industrial policy, markets, democracy, and organizational theory.

In collaboration with Alexandra Kalev, his recent work develops evidence-based approaches to diversity management, identifying organizational strategies that effectively promote inclusion.

His research has been widely featured in major national and international media outlets. Dobbin currently serves as Director of the SCANCOR/Weatherhead Initiative in International Organizational Studies and co-coordinates the MIT-Harvard Economic Sociology Seminar.

CRAIG JONES, JD, MBA



Craig is a Senior Wealth Advisor in Focus's Rocky Mountain Region, specializing in wealth management for business owners and professionals. He co-presides over the Focus Sports & Entertainment practice and has a deep understanding of the challenges clients face during life transitions, helping them develop tailored wealth strategies.

Craig co-founded the Denver-based firm Jones Barclay Boston in 1994, which merged with Focus Partners in 2017. He has experience in management, finance, tax, and strategic planning with firms like Mellon Bank, Price Waterhouse, and PepsiCo.

Recognized as a Best-in-State Wealth Advisor by Forbes from 2019 to 2022, he holds a Juris Doctor and MBA from Case Western Reserve University and a BS in Economics and Political Science from Allegheny College.

Active in various organizations, he serves as Vice President of the Denver Board of Water Commissioners and is involved with multiple foundations and associations.

Craig enjoys traveling, hiking, and film with his life partner Robbie Barr, and following the life journey of his adult son Milan. Craig's personal interests include road cycling and music.

GRANT RAWDIN, JD, CFP®



Grant Rawdin is the Founder and CEO of Wescott, which he established in 1987 after beginning his career as a young lawyer providing tax, business, and estate services at Duane Morris LLP.

He is an attorney, accountant, and CERTIFIED FINANCIAL PLANNER® professional, admitted to the Pennsylvania and New Jersey Bars, and remains associated with Duane Morris LLP.

A nationally recognized leader in wealth management, Grant has been honored by Barron's Top 100 Independent Advisors, the Barron's Hall of Fame, Forbes Top RIA Firms, and CNBC's Financial Advisor 100.

Grant is co-chair of the Net Positive Consortium, advancing sustainability and values-based leadership in the industry.

In the legal and academic communities, he serves as Chair of the Board of Visitors for Temple University Beasley School of Law and President of the Temple University Law School Foundation, and has been inducted into Temple University's Hall of Success.

Civically, he is Chair Emeritus and Co-Chair of the Finance and Audit Committee of the Urban Affairs Coalition, a \$75M organization supporting 80+ community programs across the Philadelphia region. He also serves on the Professional Advisors Council of The Barnes Foundation.

Grant holds a J.D. from Temple University Beasley School of Law and a B.A. in English Literature from Temple University. He lives in Philadelphia with his wife, Laura, and is the proud father of four children.

VALERIE RIVERA, CFP®



Valerie Rivera, CFP® is the founder of FirstGen Wealth, a virtual, fee-only financial planning practice serving individuals and families who are the First to build wealth in their world. Her mission is to break this cycle and close the wealth divide.

Investopedia named Valerie one of the country's top 100 independent financial advisors. In 2023, NerdWallet named her one of 8 Latino Financial Influencers to Follow.

She is part of the 1% of Latinas holding the CERTIFIED FINANCIAL PLANNER® designation, the gold standard of financial planning.

Valerie is a Forbes Advisory board member and a proud board member of the nonprofit Working Credit, which partners with communities and individuals to interrupt the effects of structural racism by providing credit-building education.

She regularly contributes to publications such as The New York Times, The Wall Street Journal, Forbes, Business Insider, and others regarding her expertise in personal finance.

AMANDA SCIPIONE



Mandy Scipione serves as Head of Global Diversity & Inclusion at Fidelity Investments, a firm supporting nearly 50 million individual investors, more than 24,000 employer benefit programs, and over 16,000 wealth management firms with investment and technology solutions.

She joined Fidelity in 2013, first working in relationship management for Fidelity Institutional, supporting advisory firms using the brokerage platform. She later moved to Workplace Investing, where she led the SPS Central Region Relationship Management team serving plan sponsor clients. In 2024, she became Head of Global Diversity & Inclusion.

Before joining Fidelity, Scipione worked at one of the nation's largest multi-family offices and provided management consulting support to Blue Cross Blue Shield of Massachusetts. In 2008, she co-founded Siharum Advisors, a Registered Investment Advisory firm, where she championed inclusive workplace practices.

She holds a bachelor's degree in Finance with a minor in Economics from Stonehill College and an MBA with a concentration in Finance from Boston College. She also maintains SIE, Series 7, 63, and 24 securities registrations.

DR. NICOLE B. SIMPSON, CFP®



Nicole B. Simpson is a financial expert and entrepreneur known for her strategic insight and ability to translate personal and business visions into actionable financial plans.

Raised in a marginalized New Jersey community and a survivor of the World Trade Center tragedy, she brings resilience, integrity, and a holistic approach to helping clients overcome both financial and emotional barriers to success.

Nicole is the founder and CEO of Harvest Wealth, specializing in legacy planning, clergy compensation, and advising solo practitioners. Her work has been featured in Black Enterprise, Money Matters, Crain's Business, Huffington Post, and PBS.

A CERTIFIED FINANCIAL PLANNER® professional since entering the securities industry in 1991, she holds Series 7, 63, and 65 licenses, serves on the CFP Board Center for Financial Planning's Diversity Advisory Group, and chairs the Generation X Community Association.

JUSTIN SULLIVAN, CFP®



Justin is a Senior Vice President and Market Leader for PNC Private BankSM, leading a team focused on delivering exceptional investment, trust, financial planning, and private banking services.

Previously, he managed Investment Advisors across the Southeast and served in advisory roles in several PNC markets after completing the company's rotational program.

A CERTIFIED FINANCIAL PLANNER®, Justin holds a Business Administration degree in Finance and Economics from the University of Pittsburgh.

He is a CFP® Pro campaign spokesperson and has been featured in national and local media. In 2018, he was named to InvestmentNews' "40 Under 40."

Justin serves on the boards of the National Center for Civil and Human Rights and the Midtown Alliance.

He enjoys traveling and scuba diving.