

CFP BOARD

CFP® Professionals Agreeing to Provide Financial Planning Services to Federal Workers *Pro Bono* or at a Reduced Rate¹

Arizona

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Onuselogu	Vayahn	vonuselogu@frontierinvest.com			✓	✓
Peterson	Michael	mike@letsimpactwealth.com	Impact Wealth Management	letsimpactwealth.com	✓	✓
Raths	Corey	corey@benefitandfinancial.com	Benefit & Financial Strategies, LLC	benefitandfinancial.com		✓
Shelby	LaShaun	lshelby@ffec.com	DKGB Financial	dkgbfinancial.com	✓	✓
Stansfield	Alastair	alastair@riseprivate.com	Rise Private Wealth Advisors	riseprivate.com		✓
Wennersten	Lucas	lmw@49thparallelwealthmanagement.com	49th Parallel Wealth Management	49thparallelwealthmanagement.com		✓
Zaunmiller	Darci	darcicjzaunmiller@gmail.com			✓	

¹ The individuals listed are CERTIFIED FINANCIAL PLANNER® professionals who have completed the training course presented by the Foundation for Financial Planning (FFP), *Advising Federal Government Employees During These Uncertain Times*, and who have agreed to provide financial planning services to federal government workers *pro bono* or at a reduced hourly rate (up to \$250 per hour). Financial planning services will be arranged directly between the CFP® professionals and federal government worker clients, and not through CFP Board or FFP.

California

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Barnhill	Ryan	Ryan@BarnhillWealth.com	Barnhill Wealth Management	Barnhillwealth.com	✓	
Chen	Jenny	jenny.c.chen@nm.com	Northwestern Mutual		✓	
Cooper	Chris	chris@chriscooper.com	Chris Cooper & Company	www.chriscooper.com		✓
Delgado	Carlos	cdelgado@pfadvisors.us				✓
Figueroa	Eric	eric@hesperianwealth.com	Hesperian Wealth LLC	www.hesperianwealth.com		✓
Friederich	Brenda	brenda@abunditwealth.com	Abundit Wealth		✓	✓
Gigliotti	Mai	mai.b.gigliotti@gmail.com	Wells Fargo Advisors		✓	✓
Hagen	Virginia	gina@fullcirclefinancialplanning.com	Full Circle Financial Planning		✓	✓
Holland	James	james@hswa.money	Holland Strategic Wealth Advisors		✓	✓
Johnson	Patricia	patricia@raisefinancialadvisors.com	Raise Financial Advisors	www.raisefinancialadvisors.com	✓	✓
Kekkar	Sanjay	kekars@gmail.com			✓	✓
Laney	Dianna	d.laney@lpl.com		https://www.sapphireoakswealthadvisors.com/team/dianna-laney	✓	✓
McMillan	Karen	karen@osbornepartners.com	Osborne Partners Capital Management	osbornepartners.com	✓	
Mu	Peter	peter@wealthcairn.com	Wealth Cairn - an Investor	wealthcairn.com	✓	✓

			Coaching Company			
Nelson	Bradley	Brad@PointLomaAdvisors.com	Point Loma Advisors	PointLomaAdvisors.com	✓	✓
Obest	Jonathan	jonathan.obest@mwarep.org	MWA Financial Services	reps.modernwoodmen.org/jobest		✓
Ordon	Elisa	elisaordona@gmail.com			✓	
Owens	David	david@owensinvestmentadvisors.com	Owens Investment Advisors, LLC	www.owensinvestmentadvisors.com	✓	✓
Rodriguez	Michael	michael@equanimity-wealth.com	Equanimity Wealth	https://equanimity-wealth.com		✓
Sharp	Amy	amy@amysharpfinancial.com	Amy T. Sharp, CFP®, LLC	www.AmySharpFinancial.com	✓	
Stueve	Cherie	cheriestueve@gmail.com	Dalton Education		✓	✓
Welch	Brandon	bwelch@newportwealthadvisors.com	Newport Wealth Advisors	www.wealthadvisorsandiego.com	✓	✓
Wheeler	Peter	pete.wheeler45@gmail.com	Wheeler Wealth Advisory			✓

Colorado

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Apodaca III	Fred	fred@pbfrountree.com	Personal Benefit Financial	https://pbfadvisors.com/		✓
Blair	Ron	tallfunny@msn.com	Personal Benefit Financial			✓
Gerber	Sarah	Personal Benefit Financial	Momentum Financial Planning LLC	momentumfinancialcoaching.com		✓

Jones	Evan	evan@monarchfinancial.co	Monarch Financial		✓	
Lewis	Katherine	katie@tonnfinancialplanning.com	Tonn Financial Planning	www.tonnfinancialplanning.com		✓
Morris	Casey	cmorris@capstonepacificinc.com	Capstone Pacific Investment Strategies		✓	✓
Rountree	Sharla	sharla@pbfrountree.com	Personal Benefit Financial	PersonalBenefitFinancial.com		✓
Strom	Wendi	wendi@lotusfinancialpartners.com	LOTUS Financial Partners	www.lotusfinancialpartners.com	✓	✓
Tarrall	Marilynne	marilynne@tarrall.com	NewWest Advisors	www.newwestadv.com	✓	✓

Connecticut

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Bennett	Robert	rbennett@roundrockadvisors.com	Round Rock Advisors			✓

Delaware

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Lam	Kevin	kevin@agewiselyfinancial.com	Age Wisely Financial	https://agewiselyfinancial.com/		✓
Lytle	Craig	craig@iandeplanning.com	Income & Estate Planning Partners, P.A.	www.iandeplanning.com	✓	

Florida

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Corral	Luana	luana@lmcrral.com	Associated Financial Consultants & Investor Services	lmcrral.com	✓	✓
Curran	John	johnrc1156@aol.com	Cetera	http://John.Curran.Ceterainvestors.com	✓	
Fowler	David	dfowler@highmountainfinancial.com	High Mountain Financial Planning	https://highmountainfinancial.com/		✓
Gibson-Garcia	Henry	henry@g4financialplanning.com	G4 Financial Planning	g4financialplanning.com	✓	✓
Handberg	Tracie	thandberg@verisail.com	Verisail Partners	www.verisail.com	✓	✓
Helms	Nathan	nate.helms@accurateadvisory.com	Integrity Wealth	https://www.integritywealth.accurateadvisory.com/		✓
Hendrix	Felicity	felicity@ffhcpa.com	FFH CPA	www.ffhcpa.com		✓
Hongamen	Alexis	alexis@totalfinancialplanning.com	Total Financial Planning, LLC	https://totalfinancialplanning.com	✓	✓
Janos	Roman	roman.janos@nm.com		https://romanjanos.com	✓	✓
Kaul	Desiree	Desiree@kaulfinancialsolutions.com	Kaul Financial Solutions	www.kaulfinancialsolutions.com	✓	✓
Lewis	Robert	nolan@pathfinancial.net	Path Financial	pathfinancial.net		✓
Minning	Dena	minning@personalam.com				✓
Murphy	Mary	marymm2728@gmail.com	Mary M. Murphy, CFP®, Inc.			✓

Nassi	Len	lennassi@bellsouth.net	First Financial Planners	www.financialplannerfl.com	✓	
Rios	Richard	richard.rios@wellsfargoadvisors.com	Wells Fargo Advisors	www.richardjrios.com	✓	
Sachs	Claudia	claudia.sachs@osaicwealth.com	Osaic Wealth	www.claudialsachs.com	✓	
Schulmerich	Stephen	schulmerich@comcast.net	Schulmerich and Associates Asset Management, LLC		✓	
Taub	Jennifer	jennifer@shawfinsol.com	Shaw Financial Solutions			✓
Thompson	Laura	laurathompson@gwnsecurities.com	GWN Securities	www.lauraleethompson.com	✓	✓

Georgia

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Bertelson	Lia	lbertelson@togetherplanning.com	Lia Bertelson	togetherplanning.com	✓	
Brown	Tania	coach@taniapbrown.com	Tania P. Brown Services			✓
Cullins	Tiesha	Tiesha.cullins@abacuswealth.com	Abacus Wealth Partners		✓	
Dayoub	Michael	michael.dayoub@alpha-sav.com	Alpha Financial Management	www.alpha-sav.com		✓
LaTourette	Laura	llatourette@familywmg.com	Family Wealth Management Group	https://www.familywmg.com/	✓	
Moss	Melissa	melissa.moss@mymainstreetadvisors.com	Main Street Advisors	melissamoss.co	✓	✓

Mothorpe	Jim	jmothorpe@capital-invest.com	Capital Investment Companies	www.jimmothorpe.com	✓	✓
Pearson Tucker	Michele	Michele.PearsonTucker@EdwardJones.com	Edward Jones	https://www.edwardjones.com/us-en/financial-advisor/michele-pearsontucker	✓	✓
Schippers	James	jim.schippers@gmail.com	Cana Financial Planning	www.canafinancialplanning.com		✓
Seay	Edward	ed@smartprousa.com	SmartPro Financial		✓	✓

Hawaii

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Tazawa	Travis	ttazawa@milestonewealthhi.com	Milestone Wealth Management	www.milestonewealthhi.com	✓	

Illinois

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Cohen	Ross	rdcohen77@gmail.com	Ritholtz Wealth Management	https://www.ritholtzwealth.com/	✓	
Cope	Michael	mcope@pinnplan.com	Pinnacle Planning Advisors	pinnplan.com	✓	✓
Gould	Jennifer	jgould@kirkby.com	Kirkby, Phelan & Associates	kirkby.com	✓	✓
Knobeloch	Colette	cknobeloch@osaicwealth.com	Osaic Wealth, Inc			✓
O'Connell	Daniel	dan.oconnell40@gmail.com	Northern Trust		✓	

Perdoux	Martin	mperdoux@savantwealth.com	Savant Wealth Management	https://savantwealth.com/employee/martin-f-perdoux/		✓
Redington	Jenny	jenny@stillmanbank.com	Stillman Bank	https://www.stillmanbank.com/trusts-investments/	✓	✓
Shi	Gloria	gs@gyswealthmgmt.com	GYS Wealth Management, Inc.		✓	✓
Wong	Kenneth	ken@planwithmoran.com	Moran Wealth Advisors	www.planwithmoran.com		✓

Indiana

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Deken	Norm	norm.deken@nm.com	Northwestern Mutual		✓	✓
Hodge	Ron	ron@myvalleygroup.com	Raymond James	www.myvalleygroup.com	✓	

Iowa

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Brooke	Thomas	thomas.brooke@thrivent.com	Thrivent	https://connect.thrivent.com/thomas-brooke	✓	✓
McElvania	Christine	cmcelvania@gocqig.com	Quad Cities Investment Group	www.quadcitiesinvestmentgroup.com	✓	
Schmidt	Penny	penny@ironhorsewm.com	Iron Horse Wealth Management			✓
Stalder	Jacob	jake@navigatefinancialplan.com	Navigate Financial Planning	https://www.navigatefinancialplan.com/		✓

Kansas

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Albright	Mark	mark.albright@caliberkc.com	Caliber Wealth Management	caliberkc.com	✓	
Gash	Mark	markg@sptfg.com	Summit Pointe Financial	www.sptfg.com	✓	
May	William	bmay@corenorth.com	CoreNorth Capital Planning	www.corenorth.com	✓	✓
Samimi	Jason	jason.samimi@nm.com	Salus Wealth Partners		✓	✓

Kentucky

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Garner, Jr.	Allen C.	agarner@arraswm.com	Arras Wealth Management	arraswm.com	✓	

Louisiana

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Schewe	Lisa	lisa.a.schewe@ampf.com	Ameriprise	www.ameripriseadvisors.com/lisa.a.gula/		✓

Maryland

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Bell	John	john@freestatefp.com	Free State Financial Planning	freestatefp.com	✓	✓
Briguglio	Nancy	nbriguglio@bwwwealth.com	Brightworks Wealth Management		✓	
Bultman	Kevin	kevin@thetenetgroup.com	The Tenet Financial Group	www.thetenetgroup.com		✓
Chaflawee	Zion	diamond.chaflawee@prudential.com	Prudential Advisors	https://www.prudential.com/advisor/zion-chaflawee	✓	✓
Conrad	Brian	brian.conrad@edwardjones.com	Edward Jones	www.edwardjones.com/brian-conrad	✓	✓
Foley	Karen	Kmfoley@firstcommand.com	First Command Financial Services	www.firstcommand.com	✓	✓
Forkin	Kevin	kevin.forkin@schwab.com	Charles Schwab	www.schwab.com/app/branch-services/financial-consultant/kevin-forkin	✓	
Franks	Martin	bocabroker@hotmail.com			✓	✓
Grady	Dwayne	dgrady@primefinancial.com	Prime Capital Financial Advisors	primefinancialdc.com	✓	✓
Herzstein	Basil	herzstb@bherzstein.com		www.bherzstein.com	✓	✓
Huber	Benjamin	ben@fiveriversfinancial.com	Five Rivers Financial Advisors, LLC	www.fiveriversfinancial.com	✓	✓
Humphries	Mark	mark@sentinelfp.com	Sentinel Financial Planning	sentinelfp.com		✓
London	Hali	halilondon@yahoo.com				✓

Middleton	David	david@middletonadvisory.com	Middleton Advisory, LLC	middletonadvisory.com	✓	
Muhammed	Michelle	michelle@mmwealthadvisory.com	M&M Wealth Advisory, LLC	https://www.mmwealthadvisory.com/	✓	✓
Olson	John	johnolson@2250financial.com	2250 Financial Services, Inc.	https://www.2250financial.com/	✓	
Roby	Tacy Paul	tacy.robby@tribridgepartners.com	Tribridge Partners Financial	https://tribridgepartnersfinancial.com/	✓	✓
Saini	Sandeep	sonny.saini@planvestfinancial.com	PlanVest Financial	www.planvestfinancial.com		✓
Vargas Romero	Claudia	cyvclaudia@hotmail.com			✓	✓
Washington	Jessie	jwashington@eaglestrategies.com	Alpha Solutions Group	https://www.myalphasolutions.com/	✓	✓

Massachusetts

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Howard	Kimberly	kjh@kjhfinancialservices.com	KJH Financial Services	www.kjhfinancialservices.com		✓
Pinheiro	Dan	Dan@southcoastplanning.com	South Coast Planning & Wealth Management	www.southcoastplanning.com	✓	
Sahady	Jennifer	Jensahady@yahoo.com	Jennifer Sahady			✓

Minnesota

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
O'Shaughnessy	Marty	marty@cfgretirement.com	CFG Retirement	cfgretirement.com	✓	✓

Missouri

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Abernathy	Dawn	dawn@corepln.com	Core Planning, LLC	www.DawnCAbernathy.com	✓	✓
Hunsberger	Mike	mike@nextmissionfinancialplanning.com	Next Mission Financial Planning	www.nextmissionfinancialplanning.com	✓	✓

Nebraska

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Castillo	Gerardo	gerardo.castillo@glic.com	Guardian	https://kansascity.guardianlife.com/	✓	✓

New Hampshire

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Bowden	Rhonda	Hanaifinancial@gmail.com	Hanai Financial			✓
Lavoie	Brian	brian.lavoie@lpl.com	LPL			✓

New Jersey

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Brown	Dawn	dbrown@peapackprivate.com	Peapack Private Bank and Trust	www.peapackprivate.com	✓	
Choudhury	Jayeeta	jayeeta@rewp.com	River's Edge Wealth Partners	https://www.riversedgewealth.com/	✓	✓
DeGerolamo	Anthony	anthony@degerolamofinancialstrategies.com	Equity Services, Inc.		✓	✓
McGovern	Gene	gene@mcgovernfinancialadvisors.com	McGovern Financial Advisors, LLC	https://mcgovernfinancialadvisors.com/	✓	✓
Quinones	Jaime	AskJaime@stockadewealth.com	Stockade Wealth Management	www.stockadewealth.com		✓
Sautner	Michael	mgsautner1@gmail.com				✓
Ward	Charlie	charlie.ward@lpl.com	Investment Strategies Advisors	www.investmentstrategiesadvisors.com	✓	✓

New York

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Abaya	Taunya	taunya@abayawealthmanagement.com	Abaya Wealth Management LLC	abayawealthmanagement.com		✓
Bonington	David	dbonington@staceybraun.com	Stacey Braun Associates, Inc.		✓	

Brenkovich	John	John@bfmplan.com	Osaic Wealth, Inc.	www.BFMPLAN.com		✓
Clerveaux	Eustache	EustacheFp@gmail.com			✓	
Dattilo	Marlene	marlene@keystonecpa.com	Keystone Capital Partners Group	Keystonecapitalpartnersgroup.com	✓	
Devries	Henry	henry.devries@tranquilitywm.com	Tranquility Wealth Management	www.tranquilitywm.com	✓	✓
Kiridena	Thilan	thilan.kiridena@nm.com	Northwestern Mutual Wealth Management Company	ThilanKiridena.nm.com	✓	✓
Lechner	Matt	matt.lechner@laylineadvisors.com	Layline Advisors	laylineadvisors.com		✓
Ludwa	Nicholas	Nick@harbortownfinancial.com	Harbortown Financial Group LLC	www.harbortownfinancial.com	✓	
Nagarajan	Lakshmi	lakshmi@holisticwealthadvisors.com	Holistic Wealth Advisors	www.holisticwealthadvisors.com	✓	✓
Olsen-Shillibeer	Shebna	shebna.olsen-shillibeer@equitable.com	Equitable Advisors		✓	✓
Sciuto	Maria	msciuto@compassamg.com	Compass Asset Management Group	www.compassamg.com		✓
Yuen	Michael	michael@zerodaycapital.com	Zero Day Capital	www.zerodaycapital.com		✓

North Carolina

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Agnello	Beth	beth@fairwindsadvice.com	Fair Winds Financial Advice	www.fairwindsadvice.com		✓
Chien	Chia-Li	jolly@chialichien.com			✓	
Clifton	Chuck	chuck@sycamorefinancialplanning.com	Sycamore Financial Planning	www.sycamorefinancialplanning.com	✓	✓
Feehely	Charles	Charlie@CharlesMichaelFinancial.com	Charles Michael Financial	https://charlesmichaelfinancial.com/	✓	✓
Filepp	Matthew	Filepp7@gmail.com				✓
Forbes	Wendolyn	wtforbes@wtf-asn.com	Wealth Transition Finance, A Member of Advisory Services Network, LLC	www.wtf-asn.com		✓
Gibson	Andrew	andrew@mybeaconwealth.com	Beacon Wealth Advisors	Mybeaconwealth.com	✓	✓
Jerabek	Karen	karen@harborbluefinancial.com	Harbor Blue Financial	www.HarborBlueFinancial.com	✓	

North Dakota

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Mortenson	JP	jp@johnsonwealth.com	Johnson Wealth Management			✓

Ohio

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Murphy	Sheridan	sheridan@investmfg.com	Murphy Financial Group			✓
Pitrone	Thomas	tom@pitronet.net			✓	
Simmons	Jessica	jessica@tcpasset.com	TCP Asset Management	tcpasset.com	✓	✓
Schuler	Derrick	derrick@schulerwealthplanning.com	Schuler Wealth Planning	schulerwealthplanning.com	✓	✓
Yormick	David	dave@summit-capital.com	Summit Capital, Inc.	www.summit-capital.com	✓	✓

Oklahoma

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Ball	Jasmine	jasmine@bamboofinancialpartners.com	Bamboo Financial Partners	https://www.bamboofinancialpartners.com/	✓	✓
St. Pierre	Eileen	everydayfinancialplanner@gmail.com	The Everyday Financial Planner	www.everydayfinancialplanner.com		✓

Oregon

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Richards	Douglas	doug@crestfinancialllc.com	Crest Financial LLC	www.crestfinancialllc.com	✓	✓
Wible Turowski	Lisa	lisa.k.wible@ampf.com	Ameriprise Financial		✓	✓

Pennsylvania

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Allen	Susan	susan.allen@lpl.com	The Capital Legacy	www.capitallegacy.com	✓	✓
Austin	Frank	sustainablefinancialplanning@gmail.com	Sustainable Financial Planning	sustainablefinancialplanningllc.com/		✓
Bogia-Curles	Caleb	C.bogiacurles@gmail.com			✓	
Callas	Courtney	courtney.callas@lpl.com	Armstrong Wealth Management	www.armstrongwm.com		✓
Cook	Sean	seanc@harvestadvisers.com	Harvest Advisers	www.harvestmywealth.com	✓	✓
Keil	Isaac	isaackeil@gmail.com	Isaac Financial	www.isaac.financial	✓	✓
McCrea	Scott	scott.mccrea@edwardjones.com	Edward Jones	https://www.edwardjones.com/us-en/financial-advisor/scott-mccrea	✓	✓
Sandino	Brent	mliner@aol.com	Multi-Line Financial Services		✓	✓
Sears	Tyson	tsears@hksfinancialpartners.com	HKS Financial Partners		✓	✓

Puerto Rico

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Perez	Alfredo	aperez@osaicfs.com	Osaic Wealth, Inc.		✓	✓

Rhode Island

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Harkins	Chancellor	chance@harkinswealth.com	Harkins Wealth Management	www.harkinswealthmanagement.com		✓

South Carolina

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Conley	David	dave@mfgupstate.com	Masters Financial Group	www.myupstateplanner.com		✓
Carly	Griffin	c.golias@arrowbowwealth.com	Arrow&Bow Wealth Advisors	www.arrowbowwealth.com		✓
Paula	Sabbagha	paula.sabbagha@ubs.com	UBS	www.advisors.ubs.com/tcg	✓	✓

Tennessee

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Martin	Susan	susan.j.martin@lpl.com	Franklin Wealth Solutions	franklinwealthsolutions.com	✓	✓

Texas

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Fowler	John	john.fowler@paragonwealth.net	Paragon Wealth, LLC		✓	✓
Hinojosa	Mario	mario_hinojosa@sbcglobal.net			✓	

Livingston Jr.	Emmanuel	eslivingstonjr@msn.com	Emmanuel S. Livingston, CPA/PFS, CFP®		✓	✓
McDonald	Jacob	jmcdonald@sfmplanning.com	Secure Financial Management	https://sfmplanning.com/	✓	
Mize	David	david.mize@captrust.com	Captrust	www.captrust.com	✓	
Nemoto	Larry	larrynemoto@gmail.com	Larry Nemoto, CFP®, CPA, CLU		✓	✓
Nolan	Patrick	patricknolan@gmail.com	Agility Financial Group	www.agilityfg.com	✓	✓
Slayton	Michael	sslayton@agilityfg.com	Agility Financial Group		✓	✓
Thompson	Gay	gthompson@perstirling.com	Per Stirling Capital Management	www.perstirling.com/team_member/gay-f-thompson/		✓
Watkinson	Elizabeth	natanyawatkinson@gmail.com			✓	✓
Yung	Grace	grace.yung@lpl.com	Midtown Financial Group LLC	www.midtownfg.com	✓	✓

Utah

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Osgood	Allison	allison.osgood@zionswealthadvisors.com	Zions Wealth		✓	

Virginia

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Baray	Rick	rick@baray.finance	Morgan Stanley		✓	
Bindrup	Richard	rbindrup@gmail.com	Bindrup Wealth Management		✓	
Brown	Alexander	asbrown@rbc.com	RBC Wealth		✓	
Burkholder	Steven	steve.burkholder@everence.com	Everence	www.everence.com	✓	✓
Collinson	Paul	inquire@paulcollinson.com	Legacy Planning Advisor, LLC	paulcollinson.com		✓
Doll	Jessie	jdoll@reframewealth.com	Reframe Wealth	www.reframewealth.com	✓	
Ebanks	Kedisha	ebankskedisha@gmail.com	LPL Financial		✓	
Gildersleeve Denton	Kailen	kailen.gildersleeve@gmail.com	Morgan Stanley		✓	
Kioa	Nafitalai	nuk0556@gmail.com			✓	
Herold-Jacobson	Lori	lori@jacobsonconsultingllc.com	Jacobson Consulting, LLC		✓	
Hubbell	Kelley	kelleyhubbell.team@fmr.com	Fidelity Investments		✓	
Lawton	Thomas	tlawton@rwbaird.com	RW Baird			✓
Ness	Jessica	nessj@cjmltd.com	CJM Wealth Advisers		✓	✓
Phillips	Sid	sid@dominionfinancialpartners.com	Dominion Financial Partners, LLC	dominionfinancialpartners.com		✓
Robinson	Lisa	lisad.agent@gmail.com	Virginia Financial Center	https://virginiafinancialcenter.com/	✓	

Smith	Adam	asmith@mycwa.com	Covenant Wealth Advisors		✓	
Wilt	Dennis	dennis.wilt@morganstanley.com	Morgan Stanley	the437group@morganstanley.com	✓	
Wright	Daphne	daphne.wright@lpl.com	Flourish Financial Pathways	https://www.flourishpathways.com	✓	✓

Washington

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Bormann	Nicholas	nick.bormann@gmail.com	Bormann Wealth Management LLC	bormannwm.com		✓
Bradford-Crane	Terry	admin@peaceofmindwaypoints.com	BradfordCrane Company, LLC	www.peaceofmindwaypoints.com	✓	✓
Carter	Michael	mcarter@moneyconcepts.com	Carter Financial Services		✓	✓
Cottnair	Lanette	lanette.cottnair@morganstanley.com	Morgan Stanley		✓	
Cruz	Angel	acruz@cruzwm.com	Cruz Wealth Management, LLC	www.cruzwm.com		✓
Luoma	Ernest	eluoma@hotmail.com	Ernest Luoma Financial Coaching		✓	✓
Nelson	Paul	paul.nelson@weststarparkers.com	Cetera Advisor Networks	www.weststarparkers.com		✓

Washington, D.C.

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
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West Virginia

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
Miller	Brandon	brandoncmiller@primerica.com	PFS Investments		✓	

Wisconsin

Last Name	First Name	Email	Firm Name	Website	Pro Bono Services	Reduced Rate
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Fizell	Matt	matt@planwithharmony.com	Harmony Wealth		✓	✓
Nehring	Chad	chad@ontrackadvisor.com	Conceptual Financial Advisors, LLC	www.ontrackadvisor.com	✓	✓
Smith	Kurt	Kurt.smith@nm.com	Northwestern Mutual		✓	✓
Walmer	Claire	c.walmer@lpl.com	Sun Step Financial	www.sunstepfinancial.com		✓