MEET OUR 2022 OUTSTANDING MEMBER AWARD WINNERS

BRUCE D. VAUGHN, CFP®, AIF®

2022 LIFETIME ACHIEVEMENT AWARD

Bruce is the founding partner of VLP Financial Advisors, he has been active in the profession for over 30 years and has built VLP Financial Advisors from a one-man operation into the multiple planner practice it is today.

Bruce believes that his job as an advisor is to educate and inform his clients so that they have all the information they need to make smart decisions about their finances. One of Bruce's passions is retirement income planning which he believes is just as important as investment and asset allocation choices before retirement.

Bruce also works with several local foundations helping them manage their assets and strategically plan for their continuing legacy. He also advises small businesses helping them develop and monitor their business retirement and succession plans.

Bruce's professional credentials:

- Certified Financial Planner™
- Accredited Investment Fiduciary™
- Registered Principal
- Regional Director with our affiliated broker/dealer Cetera Advisor Networks LLC
- Licensed for Life, Disability and Health Insurance

Getting to Know Bruce:

A longtime resident of Northern Virginia, Bruce lives close to our office in Vienna with his wife, Patti. Bruce and Patti have three daughters, Kaitlyn, Erin, and Caroline who live locally and join them for dinner often. Bruce enjoys traveling and has recently visited Scotland, France and Italy.

If Bruce could met anyone past or present it would be: George Patton

Place Bruce would most like to visit: New Zealand's south island

Favorite book: I love all the books by Nelson DeMille

Favorite Movie: Good Will Hunting

Favorite food: Fresh sushi

Favorite quote: "Dream as if you'll live forever, live as if you'll die today" – James Dean

Favorite holiday: Thanksgiving - Especially all the homemade pies.

Hidden talent: training dogs

What motivates Bruce: I love to help people meet their goals in life.

Something on Bruce's bucket list: Live in Italy for a month

Bruce's Biggest Accomplishment: Raising 3 beautiful, talented and caring daughters

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.

PARKER G. TRASBORG, CFP®

2022 NORMA SEVERNS AWARD FOR LEADERSHIP

Parker is a Senior Financial Adviser at CJM Wealth Advisers, a fee-only financial advisory firm in Falls Church, VA. Since joining CJM in 2011, he has enjoyed working with his clients to help them strategically solve their financial challenges and create plans to help them reach their goals. Parker is a member of both The National Association of Personal Financial Advisors (NAPFA) and the Financial Planning Association (FPA). He volunteered nine years on the Board of Directors of the Financial Planning Association – National Capital Area Chapter serving as President of the chapter during the pandemic in 2020.

Parker has been named a Top Financial Professional by *Northern Virginia Magazine* on several occasions and was named on the list of *Washingtonian's* Best Financial Advisers in 2021. He has been quoted by *InvestmentNews, FinancialPlanning*, and *Lifehacker* and has been featured on WUSA9's *Great Day Washington.*

Parker lives in Falls Church, VA with his wife, Beckie, their young children, Skyler and Hudson, and their dog, Penny. In his free time, Parker enjoys following Virginia Tech sports, spending time with his family, and going out on hikes with the dog.

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.

DANIEL LASH, CFP®, AIF®

2022 PLANNER OF THE YEAR AWARD

Dan is a partner at VLP Financial Advisors and has been active in the profession for 25 years.

Dan is a passionate advocate for the financial planning profession and was the 2016 president of the Financial Planning Association National Capital Area Chapter and served on the FPANCA board for nine years.

Dan serves on the George Mason University Alumni Association board, President of the GMU CHSS alumni board and the Chair-elect of the GMU Financial Planning and Wealth Management advisory board.

Dan's Professional Credentials:

- Certified Financial Planner™
- Accredited Investment Fiduciary™
- Licensed for Life, Disability, and Health Insurance

Dan has been named one of Northern Virginia Magazine's **Top Financial Professionals** for the last eleven years as well as being named one of Washingtonian Magazine's **Top Financial Advisors** for the past ten years. FPANCA awarded Dan with the Norma Severns Leadership Award in 2019.

Dan has appeared in articles in the Washington Post, CNBC.com, Forbes.com, USA Today, Investing Daily, Wealth Management.com, Financial Advisor IQ and Financial Adviser Magazine.

A lifelong resident of Northern Virginia, Dan resides in Fairfax with his wife, their two children, two cats and dog. Dan is a certified high school basketball referee and has been officiating basketball games at the high school level for the past six years.

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, Rose Price, CFP® chaired the Selection Committee. Selection Committee Members included FPA NCA Past President, Dan Lash, CFP®, FPA NCA 2022 President, Kirk Taylor, CFP®, FPA NCA President Elect 2022, Kelly McNerney, CFP®, as well as FPA NCA Executive Director, Peggy Nelson.

AARON W. CLARKE, CFP®, AIF®

2022 EMERGING LEADER AWARD

Aaron's background in personal finance is one of first-hand experience with money and advisors. Specifically, he witnessed a Ponzi scheme tragically bankrupt two of his grandparents during his tenure in college. Seeing the mental impact this event had on his grandfather forever changed the way Aaron viewed the value of sound financial advice and holding someone's trust.

This experience combined with an enjoyment for complex math and the goal of serving others led Aaron to a financial planning curriculum in school where he obtained an undergraduate degree in Applied Economic Management, with a concentration in Financial Planning.

During his time in college, he served as an EMT and the Financial Officer of the Virginia Tech Rescue Squad where he volunteered his time to protect the campus during critical incidents, medical emergency needs, and manage the finances of the organization.

He continues to impact his communities by spending the last 2 years on the board of Bite Me Cancer!, a local Virginia teen cancer support foundation that has helped over 9,000 patients from all 50 states, and by serving the Financial Planning Association of National Capital Area for the last 7 years, 5 of which have been spent on the Board of Directors.

In addition to his concentrated degree, he earned the CERTIFIED FINANCIAL PLANNER™ designation in 2016, and the Accredited Investment Fiduciary® in 2019. He has previously held the Virginia Life & Health Insurance, Series 66, and Series 7 Licenses; however, chose to give all of these up in 2018 to pursue a career with a 2019 & 2020 Financial Times Top 300 RIA.

Now, Aaron works as a Wealth Advisor at Halpern Financial where he assists clients in simplifying their complex personal and business issues to increase their net worth as optimally as possible to create fulfillment in life through the use of financial resources. One of his favorite questions to ask is, "What's the point of having money if you don't use it for something that matters to you?" His favorite planning puzzles often involve income generation, tax efficiency, and estate planning dynamics, all to create and protect vast multi-generational wealth, or as he calls them, the "seven-figure decisions."

In addition to wealth management, Aaron also works with financial advisors looking for a succession plan who are retiring or transitioning out of the industry and need to find their clients a happy, healthy home.

Aaron enjoys travelling to experience and learn from different cultures and so far has been to 9 countries, his favorite of which was the Catalan region of Spain. He enjoys staying physically fit by playing tennis and training for variety of races. In 2022, he hopes to complete the Spartan Trifecta.

His favorite quote is one that reminds him the value of listening to learn from everyone you meet: "A moment's insight is sometimes worth a life's experience." – Oliver Wendell Holmes.

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
Parker G. Trasborg, CFP® - 2022

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
Bruce D. Vaughn, CFP®, AIF® - 2022

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
Daniel P. Lash, CFP®, AIF® - 2022

Emerging Leader Award

Kelly McNerney, CFP® - 2020
Aaron W. Clarke, CFP®, AIF® - 2022