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EXPERIENCE

| | | |
|-------------------------|---|----------------------------|
| Chief Executive Officer | Blue Ocean Global Wealth <i>https://www.blueoceanglobalwealth.com</i> | November 2013 – Present |
| Chief Executive Officer | Blue Ocean Global Technology <i>https://www.blueoceanglobaltech.com</i> | November 2013 – Present |
| Longevity Task Force | American College of Financial Services | September 2013 – Present |
| Financial Advisor | Ameriprise Financial | March 1999 – November 2013 |

PROFESSIONAL ASSOCIATIONS

| | |
|---|------------------------------|
| Certified Financial Planner Board of Standards, Inc. CFP Board Ambassador CFP Board Ethics Educator Disciplinary and Ethics Commission Volunteer Subject Matter Expert Exam Development CFP Board WIN Advocate & Mentor | July 2004 – Present |
| Financial Planning Association - National National Board of Directors, 2013 Audit Committee 2012 Diversity Committee Co-Chair 2010, 2011, 2012 Diversity Scholarship Chair | January 2013 – December 2015 |
| Financial Planning Association-National Capital Area 2013 Chair, 2012 President, 2011 President-elect 2010 Treasurer, 2009 Consumer Outreach Director 2007, 2008 Director of Membership | September 2004 – Present |
| Virginia Council of Economic Education | July 2010 – July 2014 |
| Pilates Method Alliance Board Member 2010 Treasurer | January 2009 – December 2011 |
| University of Maryland Robert H. Smith School of Business Board of Directors | September 2002 – May 2009 |

MEDIA

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|--|--------------|
| Forbes, Contributor | 2018-present |
| Kiplinger Wealth Creation Channel , Columnist | 2016-present |
| Investopedia , Columnist | 2016-present |
| Be Inkandescent Magazine , Columnist | 2012 – 2015 |

CONTRIBUTED

Investopedia, Kiplinger, NerdWallet, MarketWatch, Reuters, Washington Post, Investment Advisor, Black Enterprise, Investment News, Wealth Manager, Christian Science Monitor, BankRate.com, GoBankingRates.com, Wall Street Journal

EDUCATION

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|--|--------------------------|
| Georgetown University , Executive Certificate in Financial Planning | September 2003 |
| University of Maryland at College Park , BS in Finance | May 1993 |
| Keio University, Tokyo, Japan , Mombusho Scholar | October 1991 – July 1992 |
| University of Maryland at College Park , BA in East Asian Languages | May 1990 |

PROFESSIONAL CERTIFICATIONS

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|---|--------------|
| Retirement Income Certified Professional[®] | May 2015 |
| Certified Divorce Financial AnalystSM | October 2011 |
| Certified Financial Planner[™] professional | July 2004 |
| Chartered Retirement Planner CounselorSM | August 200 |

