



MICHAEL R. KALAS, CFP®, AIF®

2013 NORMA SEVERNS AWARD FOR LEADERSHIP

Michael is the President of Potomac Financial Private Client Group, LLC, a financial services company in McLean, VA. Michael provides comprehensive planning for individuals in the key areas of retirement, risk management, and estate planning, as well as corporate benefit planning for institutional, public, and privately held companies.

Michael is qualified in the areas of personal financial planning, risk management, estate planning, asset allocation, and investments. He was awarded the title of Retirement Planning Specialist at his previous broker-dealer based on the receipt of a Certificate in Retirement Planning from The Wharton School of Business.

Michael is the lead financial planner and wealth distribution strategist for an integrated wealth management team that focuses on providing customized financial planning strategies to individuals, families, and businesses. He is a frequent guest lecturer on financial planning topics and is actively involved with the Department of Defense providing financial planning seminars for senior officers retiring from military service. Michael was chosen by the Financial Planning Association (FPA) to provide pro bono financial planning for victims of the 9-11 attack and for military personnel returning from Operation Iraqi Freedom and Operation Enduring Freedom.

Michael has been a CFP® professional since 1992. He is a former career Naval Officer who specialized in finance and logistics. His 23-year Navy career spanned both the Vietnam and Persian Gulf wars. While on active duty, he was promoted from Midshipman to U.S. Navy Captain (O-6). He holds a BS from the U.S. Naval Academy and an MBA from Southern Illinois University.

Along with his Pro Bono work with the FPA, Michael has been on the Investment Advisory Committee of the US Navy Supply Corps Foundation for 15 years and its former Chairman and Treasurer. Their mission is to provide college scholarships to the dependents of military service members. He is also currently on the Finance and Stewardship committees of the Prince of Peace Lutheran Church in Gaithersburg, MD. Michael resides in Potomac, MD and has been married to Deborah for 33 years. They recently welcomed their first grandchild, Henry into the family.

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 Helen Modly, CFP® chaired the Selection Committee. Committee Members included Past FPA NCA Presidents Cal Brown, Brian Jones, and Christine Parker, as well as FPA NCA Member Ross Anderson.

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 for 10 years or longer
 - b) Recognize for service to the organization or profession
 - c) Local or National Organizations such as:
 - d) FPA, IAFFP, ICFP Board
 - 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 Chapter 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

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