POTOMAC FINANCIAL
PRIVATE CLIENT GROUP, LLC

Your Financial Journey

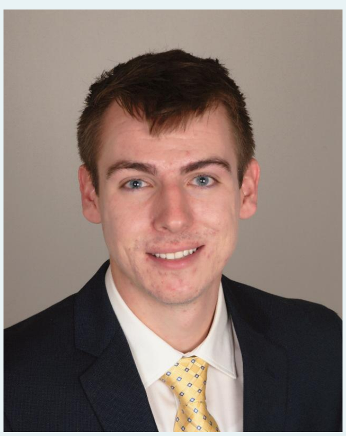
Helping You Make Better Financial Decisions

Volume 8

This issue's focus: Firm News

Steven E. Richardson Earns FIVE STAR Wealth Manager Award*

President Steven E. Richardson, CPA, MBA, CFP®, CRPS® has been named a 2017 Five Star Wealth Manager by Five Star Professional. Less than 2% of wealth managers in the DC Region were named to the list. Read more about this award ***here.***



Ryan Kellinger Promoted to Financial Planning Services Associate

Join us in congratulating Ryan for celebrating his first year with PFPCG. On October 1, he was promoted to Financial Planning Services Assistant. In his new role, Ryan will be working with clients and advisors to coordinate and manage the gathering of client financial plan and investment information, input draft financial plan and Riskalyze® data and assist in the development of our periodic client reviews. Ryan is currently working on obtaining his CFP® and continuing in his professional development as a member of the Potomac Financial client services team. Read Ryan's bio *here*.

Join us in welcoming our newest team members!

Please help us welcome Kyle Morrissey and Sebastian Vera to Potomac Financial! In addition to processing new business, insurance applications, and related customer service requests and activities, they will be reaching out to clients to schedule meetings and periodic reviews. Kyle and Sebastian graduated in the Spring of 2017 with degrees in Finance with concentrations in their respective university's CERTIFIED FINANCIAL PLANNER™ program (CFP®).   We look forward to introducing them to you the next time you visit our office.

Kyle Morrissey
Advisor Assistant.
Bio

Sebastian Vera
Advisor Assistant
Bio

Client Appreciation Event at Otium Cellars

We look forward to seeing you on Saturday, November 4th between 1 PM and 4 PM for a wine tasting and tour at Otium Cellars, Goose Creek Farms & Winery!
If you are able to join us but have not yet RSVP'd, please click here.

Lunch & Learn Webinars

October Replay:
JP Morgan's Guide to the Markets

Join us in November for
Manage Your Tax Bill for 2017 and Beyond!
Thursday, November 16th at 12 Noon EST
Click here to join

Website Who We Are Firm News Giving Back Resources Contact Us

Contact Us:
6723 Whittier Avenue, Suite 305
McLean, VA, 22101
703-891-9960
info@potomacfinancialpcg.com

Connect with us