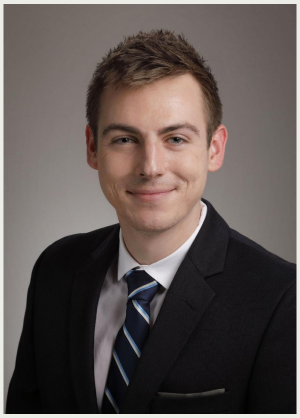
POTOMAC FINANCIAL
PRIVATE CLIENT GROUP, LLC

Your Financial Journey

Helping You Make Better Financial Decisions

Volume 22



Ryan C. Kellinger, CFP®, Advisor

We are thrilled to announce Ryan's promotion to Financial Advisor. Ryan joined Potomac Financial in 2016 after graduating from Virginia Tech with a degree in Finance and a concentration in Financial Planning and earned the Certified Financial Professional (CFP®) designation in 2018. He has been an invaluable member of our team for the past five years, most recently focusing on Financial Planning. Please join us in congratulating Ryan on this achievement!
Click here to read the press release.

Welcome to the Newest Member of our Team!

Grayson Hurley, a 2021 graduate of Virginia Tech's Finance Department, has joined Potomac Financial in the role of Advisor Assistant. Like Ryan, Kyle, and Sully before him, Grayson completed the VT CFP® Certification Education Program. Click here to read Grayson's bio. We are happy to have him on board and look forward to introducing him to you soon!

Congratulations to Steve Richardson for earning his AIF® Credential!

Steve has been awarded the Accredited Investment Fiduciary® (AIF®) Designation from the Center for Fiduciary Studies®, the standards-setting body for Fi360, a Broadridge company. The AIF® Designation signifies specialized knowledge of fiduciary responsibility and the ability to implement policies and procedures that meet a defined standard of care. Click here to read more about this achievement.

We take a "Summer Break" in August from our monthly webinars, but stay tuned. Our September webinar will focus on today's extraordinary Real Estate Market and we know you will find it very informative and timely!

Do you have a topic you would like us to focus on? Email us your suggestions to info@potomacfinancialpcg.com

Webinar Archive

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