Your Financial Journey

Helping You Make Better Financial Decisions

Volume 27

PFPCG Welcomes New Advisors and Clients

We are very excited to announce the addition of two highly experienced advisors to our team and their clients to Potomac Financial. Nancy Rick, CFP and Phil Corso, MBA, joined the PFPCG team this January, bringing with them the more than 150 families they serve.

As a team, Nancy and Phil have more than 40 years combined experience in financial services and are long-time members of the Reston and Herndon community.

"As we talked with Nancy and Phil about the possibility of them joining the Potomac Financial team, we realized that our approach to serving clients is closely aligned and that sharing expertise would benefit everyone," explained Joe Lamoglia, ChFC®, Principal and Senior Advisor. "We are very much looking forward to meeting each of the clients Phil and Nancy bring with them and welcoming them to our firm."

Phil Corso, Senior Advisor says "As our practice has grown quickly over the last few years, we started looking for an opportunity to collaborate with other advisors -- and Potomac Financial has a great reputation as an independent advisory firm. Like us, the advisors of Potomac Financial believe in giving back to the community. In fact, Nancy and Joe have known each other for many years through their work with Reston Rotary," he continues. "The more we all shared about our way of doing business and how we go about helping people navigate an increasingly difficult financial landscape, the more we realized how much all our clients would benefit from us working together."

You can read Nancy Rick's bio here and Phil Corso's bio here.

Staff News

Ryan "Sully" Sullivan

Please join us in congratulating Ryan on his recent promotion to Financial Planning Associate. In addition to earning his CFP® designation, Ryan has completed his FINRA securities licensing exams (Series 7 and 66) and obtained his Life and Health Insurance license. As a Financial Planning Associate, Ryan will become more deeply involved in the financial planning and investment management process, working closely with our senior advisors and our clients. On a personal note, we also congratulate him on his recent engagement to his fiancée, Amber. Your future looks bright, Sully!

January Webinar: JP Morgan's Guide to the Markets

Join Tim Shean and Andrew Hartman, CFA, Client Advisor at J.P. Morgan Asset Management for a review of the current state of our markets and economy and institutional insight into what lies ahead for the first quarter of 2023 and beyond. Mark your calendar for this Zoom webinar on Thursday, January 26th at 12:00 PM ET. Click on the link below to register!

Register

Key Financial Data 2023

The 2023 version of this useful data card is now available. It provides an excellent reference for numbers you need on taxes, Social Security, health care, Medicare, retirement, college planning and more. Download your copy today!

Key Financial Data

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