FPA ANAHEIM 2009

The Annual Conference of the Financial Planning Community

TRACK:	***LEADERSHIP LABORATORY***
SESSION: ***979043***	**ORGANIZATIONAL LEADERSHIP: A DISCUSSION OF HOW DIFFERENT PRACTICE SIZES DETERMINE THE DECISIONS OF OWNERS**
	MONDAY, OCTOBER 12, 2009
	10:00 AM - 11:45 AM
PRESENTER:	Louis P. Stanasolovich, CFP® Legend Financial Advisors, Inc Suite 350 5700 Corporate Dr Pittsburgh, PA 15237-5829

Louis P. Stanasolovich, CFP® is founder, CEO and President of Legend Financial Advisors, Inc.® (Legend), a fee-only Securities and Exchange Commission registered investment advisory firm with its headquarters located in Pittsburgh, Pennsylvania. Legend provides Wealth Advisory Services, including Personal Financial Planning and Investment Management, to affluent and wealthy individuals as well as business entities and non-profit organizations. Lou is one of only four advisors nationwide to be selected twelve consecutive times by Worth magazine as one of "The Top Wealth Advisors" in the country. Lou has also been selected five times by Medical Economics magazine as one of "The 150 Best Financial Advisors for Doctors in America", twice as one of "The 100 Great Financial Planners in America" by Mutual Funds magazine, and once by Barron's as one of "The Top 100 Independent Financial Advisors". He has previously been named by Fortune Small Business magazine as one of "America's Best Bosses". He has been named to Investment Advisor magazine's "IA 25" list three times, ranking the 25 most influential people in and around the financial advisory profession, as well as being named by Financial Planning magazine as one of the country's "Movers & Shakers", recognizing the top individuals who have done the most to advance the financial advisory profession and who are effectively shaping its future. Lou was also selected by Smart Business Pittsburgh as a 2008 Pacesetter, an award that recognizes outstanding and innovative business and community leaders who have made a significant impact on the region and its future. Lou is also the Editor of Risk-Controlled Investing, a subscription service including a monthly newsletter which guides financial advisors as to how to build better investment portfolios with lower risk.

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PRESENTER:	Gregory D. Sullivan, CFP®, CPA/PFS Harris SBSB Suite 1000 8180 Greensboro Dr McLean, VA 22102-3823

Greg Sullivan is President of Harris SBSB, a service of Harris Private Bank that provides comprehensive financial planning and wealth advisory services to affluent clients. Mr. Sullivan, who co-founded Harris SBSB in 1991, is responsible for ensuring the continued growth and development of the business and specializes in providing investment management, tax advisory and financial planning services to clients. Mr. Sullivan earned his bachelor's degree from Pennsylvania State University and has over 25 years of experience advising affluent clients. He is a CERTIFIED FINANCIAL PLANNERTM professional, a Certified Public Accountant (CPA) and is accredited as a Personal Financial Specialist (PFS) by the American Institute of Certified Public Accountants. Mr. Sullivan is actively involved in the financial planning community. He is past president of the International Association for Financial Planning (now called the Financial Planning Association) and served on its Board of Directors from 1989-1997. He is a founding member of the Alpha Group, a nationally recognized group of leading financial planners.

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PRESENTER:	Evelyn M. Zohlen, MBA, MS, CFP® Inspired Financial Suite 7 5011 Argosy Avenue Huntington Beach, CA 92649

Evelyn M. Zohlen is the founder of Inspired Financial, LLC. She has served on both the personal and the institutional sides of financial services for over ten years. Prior to founding Inspired Financial, Evelyn was a Relationship Manager at The Vanguard Group where she was the trusted advisor for clients with retirement plan assets ranging from $175 million to $500 million. She received her Bachelor’s degree from the University of Texas, her Master of Science from the Joint Military Intelligence College, and her Master of Business Administration from Villanova University. Evelyn is a Certified Financial Planner™ (CFP®) professional and is President Elect of the Financial Planning Association in Orange County. She is an adjunct professor in the Personal Financial Planning Program at the University of California at Irvine. In addition, she is a community leader and serves on the Board of Directors for WomanSage. She has also served on the Board of Directors for the American Poetry Review, the President's Council at Immaculata University, and as the Finance Director for the Young Friends of the Philadelphia Museum of Art. Evelyn is a frequent contributor to periodicals such as USA Today, Investment News, Kiplinger’s Personal Finance, Real Simple and Consumer Reports. Prior to entering the financial services profession, Evelyn served as an intelligence officer in the United States Air Force.

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