David J. Boczar, CFA

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David J. Boczar, CFA AUTHORIZED TO USE CFP®, CERTIFIED FINANCIAL PLANNER™ AND CERTIFICATION MARKS

David J. Boczar, CFA is pleased to announce that he has been authorized by the Certified Financial Planner Board of Standards Inc. (CFP Board) to use the CFP®, CERTIFIED FINANCIAL PLANNER™ and certification marks in accordance with the CFP Board certification and renewal requirements. These marks identify those individuals who have met the rigorous experience and ethical requirements, have successfully completed financial planning coursework, and have passed the CFP® Certification Examination covering the following areas: the financial planning process, risk management, investments, tax planning and management, retirement and employee benefits, and estate planning. CFP® certificants must also agree to meet ongoing continuing education requirements and to uphold CFP Board's *Code of Ethics and Professional Responsibility* and *Financial Planning Practice Standards.*

"I am very pleased to be awarded the CFP®, CERTIFIED FINANCIAL PLANNER™ and certification marks. I consider the CFP certification to be the financial planning industry's highest standard. As a longtime Chartered Financial Analyst (CFA) charterholder, I certainly understand the value clients place on professional certifications and designations when evaluating financial professionals. Given the turbulent financial climate, this has taken on a significantly higher level of importance in recent years," exclaimed Boczar. According to Denver-based Certified Financial Planner Board of Standards Inc., there are over 42,000 individuals authorized to use the marks in the U.S. and more than 33,000 in 16 other countries. Approximately 2% of which are also CFA charterholders.

David has a long and distinguished career in the financial services industry in equity and fixed-income security analysis, asset management, compliance and banking, encompassing over 20 years of experience. In his private wealth management/financial planning practice, David has been instrumental in assisting clients in areas such as asset management, educational planning strategies, life insurance planning, long-term disability implementation, long-term care insurance, estate planning strategies,* and savings/accumulation strategies.

David is a member of the Financial Planners Association (FPA), the Association for Investment Management and Research (AIMR), the New York Society of Security Analysts (NYSSA), and is a former Board Member of the Fixed Income Analysts Society (FIASI). Active in the local community, David currently serves as Treasurer and Board Member of the Easton Exchange Club and he is also Custodian of the Trust Funds for the First Presbyterian Church of Fairfield, CT. David is a member of the Fairfield, CT Chamber of Commerce and is also an activity leader of the Welcome Club of Fairfield and Easton. He formerly served as both President and Vice President of the Theta Chi Alumni Corp. of Rutgers University. David is married and has two children. He and his family live in Easton, CT.

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* Please seek the guidance of your professional tax and legal advisors before making any decisions. CFP Board, a nonprofit regulatory organization, fosters professional standards in personal financial planning so that the public values, has access to and benefits from competent and ethical financial planning. CFP Board owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP (with flame logo)®, which it awards to individuals who successfully complete initial and ongoing certification requirements. For more about CFP Board, visit www.CFP.net. For information about David J. Boczar, CFP®, CFA, please call (203) 226-0222 or visit www.davidjboczar.com.