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CFP BOARD ETHICS WORK GROUP

The CFP Board Ethics Work Group is responsible for creating the content and corresponding materials for the 2018-2019 Ethics course to be offered by CFP Board CE Sponsors. All CFP® professionals are required to take this 2-hour Ethics course each reporting period.

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Dan Candura, CFP® provides financial advice and education to consumers and financial professionals. He is founder of his own education and consulting firm Candura Group, LLC. As President of PennyTree Advisers. LLC, a Registered Investment Advisory firm, Dan provides personal financial planning for consumers and litigation support for attorneys. Dan is a FINRA arbitrator. He also writes a monthly column “Ask the Ethicist” for Investment News and serves as the CFP® Ambassador for the Boston area.

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Melissa uses her financial background and economic and business education, along with the CFP® and AEP® credentials and skills, in non-traditional ways. She prides herself with remaining exceptionally connected to information and best practices in financial planning, business succession planning, estate planning, income, gift and estate tax codes, life insurance options and alternatives, traditional and non-traditional investments, and non-profit law subject matters.

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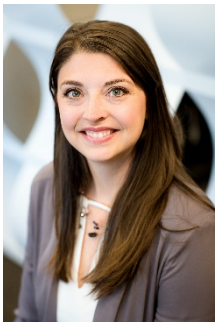
Phuong Luong is a financial planner and educator who specializes in financially empowering individuals and families with low to moderate incomes. She is the founder of Just Wealth, a fee-only financial planning practice. Most recently, Phuong was the Director of Financial Services for Compass Working Capital, a national nonprofit, providing financial coaching and counseling services to individuals and families who receive subsidized housing support. Phuong passed the CFP® Certification Examination in November 2014 and anticipates having her CFP® marks by early Fall 2017.



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Jeanna works as a Financial Advisor focused on young families with a specialization in home purchases, college savings, student debt repayment, and retirement planning. She has a passion for lifelong learning and uses education to empower others to achieve their diverse financial goals. Before transitioning to West Financial Advisors, Jeanna was a faculty member at Iowa State University teaching for Financial Counseling and Planning, a CFP Board-Registered Program. She provided comprehensive financial planning services in the Financial Counseling Clinic and expanded the curriculum to include cutting edge teaching strategies.

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As Senior Director of Content Development, Cindy leads a team of Wealth Management subject-matter authors and editors. She has more than 25 years of experience in the financial services industry. Cindy joined Kaplan in 2005 as a CFP® exam content author/editor. Cindy earned her Masters of Science in Finance from Kaplan University and a Bachelor's degree in Business Administration from Louisiana State University. She is an active member of the Financial Planning Association.

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Carolynn is the Program Director for Boston University's Financial Planning. She has taught estate planning courses, online reviews and CFP® Certification Exam courses at universities in Massachusetts and Florida, as well as for many banks and financial service companies in both states. Carolynn is co-author of an estate planning textbook, *Principles of Estate Planning*, published by National Underwriter. She served as a member of CFP Board's Council on Education from 2009-2012, and was appointed Chair in 2012. Former positions include Program Director for Merrimack College, co-founder of Beacon Hill Financial Educators, and Regional Director of the Social Security Disability Program in MA.