



## NAPFA Recognizes 2023 Award Recipients

**CHICAGO, IL** — April 3, 2023 - The National Association of Personal Financial Advisors (NAPFA) is pleased to announce its 2023 award recipients.

**Jessica Hovis Smith**, President of Longview Financial Advisors, Inc., has been awarded the **2023 NAPFA Inspiring Leader Award**. This award is presented to a NAPFA member who has established a record of encouraging, motivating, and engaging others in reaching their full professional potential under the auspices of the Association. Smith has acted as a mentor for several years and is a long-standing NAPFA member and volunteer. Over the past several years, she has transitioned to owner and president at Longview Financial Advisors, Inc. while continuing to support those around her and finding ways to elevate them in the profession.

**Daniel Yerger** has been awarded the **2023 NAPFA New Professional Award**. This award is designed to recognize the achievements and contributions to the profession of young practitioner members of the Association. It may be presented to a member who has made outstanding contributions in their professional and volunteer roles. Yerger is an active NAPFA member and volunteer. He helped organize the NAPFA West Region Symposium that took place in early 2023. In addition to mentoring new planners, actively engaging with others about the profession, and working on a financial planning career book, Yerger is pursuing a PhD in Personal Financial Planning at Kansas State University. He serves on several committees in the profession and has been recognized for his work in the profession, including a certificate of appreciation for pro bono work from the Financial Planning Association of Colorado.

**Geoffrey Brown** has been awarded the **2023 NAPFA Special Achievement Award**. This award is presented for significant contributions that greatly enhances Fee-Only financial advisors, the profession of providing financial consulting services, or helps educate consumers on the benefits of having a comprehensive financial plan and working with a highly qualified financial advisor by a non-member. This award has been presented for exceptional, long-term service to the profession or public.

Brown served as CEO of NAPFA for nine years. During his tenure, Brown formalized the strategic planning process and re-oriented the Board of Directors from revolving initiatives to a long-term strategy. He recognized the need for large firm engagement and developed programs and opportunities for their involvement. He was an active and effective spokesperson to the media and public on behalf of NAPFA, and collaborated regularly with external stakeholders, allowing NAPFA to grow in the profession and adjacent fields. Despite the struggles of leading an association throughout the COVID-19 pandemic, NAPFA remained successful, and membership continued to increase under Brown's leadership. He led NAPFA staff and volunteers to produce high-quality virtual opportunities while minimizing the budgetary impact of the pandemic on the organization. Throughout his nine years with NAPFA, Brown encouraged countless members to become involved in volunteer leadership. And in 2017, NAPFA launched the DEI Initiative; this initiative developed the NAPFA DEI Training & Certificate Program, which was recognized with a "Wealthies" Award in 2022 from WealthManagement.com.

**Oak Wealth Advisors, LLC, and CI Budros Ruhlin Roe (CI BRR)** have been awarded the **2023 NAPFA Excellence in DEI Award**. This award, new in 2023, is designed to recognize the achievements and efforts of firms to advance DEI in their organizations. The award will be granted based on specific initiatives executed at the firm level.

Mike Walther, Founder and President of Oak Wealth Advisors, established his firm so that families with loved ones with disabilities could access fiduciary financial advice and build plans for their futures with advisors required to put their clients' interests ahead of their own. His mission is to help as many families as he can by creating content, teaching classes, giving lectures, and serving clients.

Oak Wealth Advisors works to integrate the strengths and passion of those with special needs into every aspect of their firm. All employees have a family member with special needs. All the art in the headquarters office was created by individuals with disabilities. The birthday and holiday cards the firm sends to friends and clients are all designed by individuals with disabilities. The annual "thank you" gifts their clients receive are made by individuals with disabilities or companies that were founded to employ individuals with disabilities. Mike's brother, who is on the Autism spectrum, motivates him every day.

CI Budros Ruhlin Roe (CI BRR) has prioritized an emphasis on diversity and inclusion through multiple initiatives, knowing that this will greatly impact attracting and retaining wonderful associates and clients alike. Programs include a D&I Committee, guiding associate programs and communications for greater inclusivity, and a Women's Initiative group, fostering education and relationship-building among female associates. The firm has offered a Women in Wealth Management scholarship plus internship award for the past seven years and a Diversity in Wealth Management scholarship plus internship award for the last three years to qualifying college students studying finance. One of the firm's founders, Peggy Ruhlin, also just published a book titled *Wealth is Women's Work* to encourage women to consider a career in financial planning.

Lastly, the NAPFA Foundation has recognized **Abacus Wealth Partners** for the **2023 NAPFA Foundation Pro Bono Service Award**. This award recognizes the community service work of NAPFA members who have contributed their time and financial planning expertise to helping those in need achieve positive financial outcomes in the future. This award is presented to a planner or financial planning firm in recognition of their significant pro bono contributions to a nonprofit organization, social services agency or directly to individuals through their own firm.

A core value of Abacus is Serve Others. Representing this core value is the firm's Pro Bono Initiative. Each CFP® Professional at the firm completes at least eight hours of pro bono work each year in addition to facilitating long-term pro bono client relationships. Abacus also offers additional pro bono sessions in honor of Pride Month to LGBTQ+ individuals and families. The firm has partnered with B Corp businesses and Non-Profit organizations to offer pro bono financial guidance.

Through these offerings, Abacus has served more than 200 households in addition to providing financial advice to ongoing pro bono clients and has shared its methods with other advisory firms in hopes of inspiring others to offer pro bono planning. Additionally, the firm has developed free online financial literacy courses hosted on its online learning platform, Abacus Academy.

The NAPFA Awards Program recognizes leaders and achievers for their noted accomplishments within financial planning. Recognition as part of the NAPFA awards program is an outstanding accomplishment and a great honor. Learn more about the program at [www.napfa.org/awards](http://www.napfa.org/awards).

**About NAPFA**

Since 1983, the National Association of Personal Financial Advisors has provided Fee-Only financial advisors across the country with some of the highest standards possible for professional competency, comprehensive financial planning, and Fee-Only compensation. With more than 4,500 members across the country, NAPFA is the leading professional association in the United States dedicated to the advancement of Fee-Only financial planning. Learn more at [www.napfa.org](http://www.napfa.org).

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