



For Immediate Release

June 28, 2018

Contact: Jacqueline O'Reilly
oreillyj@napfa.org; 847-483-5400 x124

NAPFA Selects Annual Award Winners

Emmy-nominated News Analyst Among the Recipients

Chicago, IL – The National Association of Personal Financial Advisors (NAPFA), has chosen five leaders in the financial planning field as 2018 NAPFA Award recipients.

Awards were presented to NAPFA members Marjorie Fox, Brian Thompson, Jacob Kuebler and Stacy Francis not only for their commitment to the NAPFA organization, but also to the ideals of mentoring, leadership and encouragement. Emmy-nominated news analyst, Jill Schlesinger, was also recognized for her contributions to the financial planning profession and consumer education.

Marjorie Fox, CFP®, of FJY Financial received the Robert J. Underwood Award in recognition of an outstanding record of service to NAPFA, and significant advancement of the ideals of Fee-Only financial planning. Marjorie is known for helping other advisors find their passion, discover their strengths, and flourish as contributing members of the financial planning community. Marjorie has been characterized as the embodiment of the NAPFA ideal.

Brian Thompson, CFP®, of Brian Thompson Financial received the NAPFA Inspiring Leader Award, presented annually to a NAPFA member with a record of encouraging and motivating others in reaching their full professional potential. He is a former tax attorney and the founder of a financial planning firm focused on serving LGBTQ couples. Mr. Thompson serves as the president of XY Planning Network's Diversity Committee, and was recently named one of InvestmentNews' 40 Under 40.

Recipient of the NAPFA New Professional Award is Jacob Kuebler, CFP®, founder of Bluestem Financial Advisors. The NAPFA New Professional Award is awarded to practitioners under the age of 35, who have demonstrated exceptional influence in their professional and volunteer roles. Although still in the early stages of his career, Mr. Kuebler has served the NAPFA membership as the Genesis Leadership Committee chair, and as a member of both the Leadership Development Committee and the Presidents Council. He has been a NAPFA Conference speaker and panelist, and contributor to the *NAPFA Advisor*.

Stacy Francis, CFP®, founder of Francis Financial and Savvy Ladies is the inaugural recipient of the NAPFA Consumer Education Foundation (NCEF) Pro Bono Award. This newly-established award recognizes the

community service work of a NAPFA member who has contributed time and financial planning expertise to helping those in need in order to achieve a positive financial future.

Through Savvy Ladies, the nonprofit Ms. Francis founded, she educates women about finances and donates her time to creating financial roadmaps for women going through difficult life transitions such as divorce, separation, loss of a spouse, or career change. Ms. Francis launched Savvy Ladies in a small New York City apartment and over the past fifteen years, has assisted more than fifteen-thousand women in getting the information and resources they need to lead a financially secure life.

Jill Schlesinger, CFP®, is the recipient of this year's NAPFA Special Achievement Award, presented for significant contribution to Fee-Only financial planning or helping to educate consumers on the importance of having a comprehensive financial plan. Ms. Schlesinger is an ardent supporter of NAPFA, and of Fee-only financial planning. She is an Emmy-nominated business analyst for CBS News and serves as the Senior CFP Board Ambassador for the Certified Financial Planner Board of Standards, where she provides advice, explains the impact of current trends on consumers' lives, and encourages the use of CFP® professionals in creating a financial plan.

In addition to her television and radio appearances for CBS News, Ms. Schlesinger is also the host of the nationally-syndicated radio show, "Jill on Money" which won the 2018 Gracie Award for the Best National Talk Show, and the "Better Off" podcast. She writes the "Jill on Money" column for Tribune Media Services and is currently writing her first book.

"This year's award recipients comprise a truly accomplished group of professionals," said Geoffrey Brown, NAPFA's Chief Executive Officer. "Each of them has found the time and energy to build their businesses, as well as provide mentorship, leadership, education and community service. They are the personification of NAPFA ideals."

If you are interested in speaking with one of these NAPFA Award recipients, please contact Jacqueline O'Reilly, NAPFA's Marketing and Communications Manager at OREillyJ@napfa.org or 847-483-5400, x124.

About NAPFA

Since 1983, The National Association of Personal Financial Advisors has provided Fee-Only financial planners across the country with some of the highest standards possible for professional competency, comprehensive financial planning, and Fee-Only compensation. With more than 3,300 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.