

Frank C. Boucher, CEBS, CFP®

Thirty-year industry veteran Frank Boucher is owner and founder of Boucher Financial Planning Services. The firm offers hourly, fee-only services on an as-needed basis. It does not sell products or accept any revenues from third parties. All compensation comes solely from the firm's clientele.

Prior to starting his own practice, Frank worked for a national association that provided financial education and individual planning services to its members' employees – all of whom were “every day people” from all walks of life. Over time, Frank learned that everyone had important financial issues but it disturbed him when he saw how difficult it was for these people to get competent, objective help when they needed it. “Much of the advice they got was from people who sold investment products” says Frank, “and they really weren't comfortable with that. I decided that when I went on my own that I would not only focus on serving this market but that I would offer the kind of independent, flexible help that I'd want if the tables were turned.”

Services offered include:

- Comprehensive Financial Plans
- Portfolio Analysis and Review – including 401(k) plans
- Asset Allocation and Risk Tolerance
- Retirement Planning
- Estate Planning
- Life and Disability Insurance Needs Analysis
- Insurance Review
- Tax Planning
- College Education Funding
- Cash Flow and Debt Analysis
- Employee Education Programs
- Financial Check Ups/Second Opinions

Any or all services may be rendered under a single engagement or a series of engagements over time. “People often think that financial planning is just about investments and they tend to focus their energy on near-term investment returns,” says Frank. “Unfortunately, we have little, if any, control over tomorrow's investment results but, if we learn to define our goals and manage the things we can control like expenses and debt, the inevitable ups and downs of our investments won't have as much impact on us emotionally. Peace of mind and a sense of surety is what financial planning is all about.”

About Frank ...

Frank is a veteran of the financial services industry. With over 30 years of experience on which to stand, he holds the Certified Employee Benefit Specialist (CEBS) designation, a credential he earned by completing a 10 course program jointly developed and

administered by the International Society of Certified Employee Benefit Specialists and the Wharton School of Business. He completed his financial planning coursework through the College for Financial Planning in Denver, Colorado and has been authorized to use the CFP® mark of distinction since 1999. He is a member of the International Society of Certified Employee Benefit Specialists (ISCEBS) and has served as president of both the Southern New England and National Capital chapters. He is also a member of the Financial Planning Association (FPA) and the National Association of Professional Financial Advisors (NAPFA).

Frank has been frequently quoted in local and national media including the *Washington Post*, the *Washington Business Journal*, *Money Magazine*, CNNmoney.com, ABCNEWS.com and others.

Boucher Financial Planning Services
1900 Campus Commons Drive, Suite 100
Reston, VA 20191
Phone: 703-391-8466
E-mail: fboucher@verizon.net
www.boucherplanning.com

CFP® and CERTIFIED FINANCIAL PLANNER™ are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete the CFP Board's initial and ongoing certification requirements.