MICHAEL E. KITCES
michael@kitces.com | @michaelkitces | www.kitces.com
703-375-9478

EDUCATION

Master's in Taxation with honors**,** University of Tulsa, Tulsa, OK, 2006.

Master of Science in Financial Services, American College, Bryn Mawr, PA, 2003.

Bachelor of Science in Psychology with honors, Bates College, Lewiston, ME. 2000.
Honor's Thesis: Statistical Power in Split-Plot Factorial Designs

Professional Designations and Certifications: Certified Financial Planner™ (CFP®), Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Registered Health Underwriter (RHU), Registered Employee Benefits Consultant (REBC), Chartered Advisor of Senior Living (CASL), Certified Wealth Preservation Planner (CWPP™), Graduate certificate in Customized Asset Management. Graduate certificate in Estate Planning.

FINANCIAL PLANNING EXPERIENCE

Practitioner Editor, *Journal of Financial Planning*, 2012-Present

Publisher, *The Kitces Report*, *Nerd's Eye View*, Kitces.com, 2008-Present

Partner, Director of Research, Pinnacle Advisory Group, Columbia, MD. 2008-Present
Director of Financial Planning, Pinnacle Advisory Group, Columbia, MD. 2002-2008;

Annuity & Financial Planning Consultant, Various. 2004-Present

Freelance Writer & Editor, Various, 2004-Present

Client Service Manager/Financial Planning Analyst, Medallion Financial Group, Gaithersburg, MD. 2001-2002

Insurance Agent, Financial Advisor, New England Financial, Bethesda, MD. 2000-2001

Statistics Tutor/Teaching Assistant, Deans' Office/Psychology Department, Bates College, Lewiston, ME. 1998-2000

HONORS/AWARDS

Movers & Shakers, Financial Planning Magazine, 2006
Rising Star of Wealth Management, Institutional Investor News, 2007
Influencer, Financial Planning Magazine, 2010
Heart of Financial Planning Award, National Financial Planning Association, 2010

Legacy Builder, Financial Planning Magazine, 2010
Financial Planner of the Year, FPA National Capital Area chapter, 2011
Power 20, Investment News, 2011-2012
IA 25 Influencer, Investment Advisor magazine, 2012 & 2013

CURRENT PROFESSIONAL AFFILIATIONS

AICPA Personal Financial Planning National Conference Committee, 2012-Present
Chair, Financial Planning, Society of Financial Services Professionals, 2010-Present
Practitioner Editor, Editorial Review Board, Journal of Financial Planning, 2006-Present
Editorial Advisory Board, National Underwriter Tax Facts, 2011
Board of Directors, Wegener Adaptive Growth Fund, 2006-Present
Board of Directors, Treasurer, Washington Improv Theater, 2004-Present
Commentator – Annuities, Employee Benefits and Retirement Planning, Leimberg Information Services, 2005-Present
Financial Services Expert, Gerson Lehrman Group, 2006-Present
Member, Financial Planning Association, 2002-Present
Member, Society of Financial Services Professionals, 2007-Present
Member, American Mensa Society, 2005-Present

PRIOR SERVICE – PROFESSIONAL ASSOCIATIONS

Board of Directors, Academy of Financial Services, 2011-2012
FPA Retreat National Conference Chair, 2011
Government Relations Tax Subcommittee, Chair, Financial Planning Association, National, 2009-2010
Public Issues Advisory Committee, Financial Planning Association, National, 2009-2010
Financial Planning Perspectives Committee, Financial Planning Association, National, 2008-2009
SFSP Board of Directors, Maryland Chapter, 2007-2009
Journal of Financial Planning Financial Frontiers Judge, 2007
Journal of Financial Planning, Editorial Review Board, 2005-2007
Journal of Financial Planning Call for Papers Judge, 2005
CFP Board Field Test, September 2005, September 2007
CFP Board Paired Item Review, August 2007
CFP Board Certification Exam Review, January 2007
FPA NexGen National Conference Chair, 2007
FPA Maryland President-Elect, President, Char, 2007-2009
FPA Maryland Board of Directors, 2005-2006
FPA National Financial Planning Perspectives Committee 2005-2007
FPA McLagan Practice Management Scorecard Study Task Force, 2006
FPA National Virtual Learning Center Committee 2006
FPA NexGen National Conference Task Force, 2006
FPA National Professional and Career Development Committee 2005-2006
FPA Moss-Adams Compensation & Staffing Study Task Force, 2005
FPA San Diego National Conference Bridge the Gap Task Force, 2005
FPA Maryland Public Relations Chair, 2004
FPA Maryland Public Relations Committee, 2003
Moderator, Financial-Planning.com Message Boards, 2002-2008

PUBLISHED MATERIAL

Books Published:

"The Annuity Advisor" (co-authored with John Olsen) – National Underwriter – 2005

"Tools & Techniques of Retirement Income Planning" (co-authored with Stephan Leimberg, Bob Keebler, Aaron Coates, & Ben Baldwin) – National Underwriter – 2007

"The Annuity Advisor, 2nd edition" (co-authored with John Olsen) – National Underwriter – 2009

"Exchange-Traded Funds" (contributor, "Tactical Asset Allocation" chapter, edited by Seddik Meziani) - Risk Books - 2009

Articles Written – Journals:

Journal of Financial Planning – "Creditor Protection for Retirement Accounts: ERISA, the Supreme Court, and the Bankruptcy Act of 2005" – August, 2005

Journal of Retirement Planning – "Retirement Accounts and the Bankruptcy Act of 2005: Simplification, the Old Rules, and the New Rules" – July/August, 2005

Practical Tax Strategies – "Mortgage Interest Deductibility: More Than Meets The Eye" – September, 2005

Journal of Financial Planning – "Understanding Secular Bear Markets" (co-authored with Ken Solow) – March, 2006

Journal of Financial Planning – "Long-term [financial planning] implications of the Tax Increase Prevention and Reconciliation Act of 2005"- February, 2007

Journal of Financial Planning - "The Emerging Trend of Tactical Asset Allocation" - June, 2010

Journal of Accountancy - "IRA Charitable Distributions No Panacea" - April, 2011

Journal of Financial Planning - "Improving Risk-Adjusted Returns Using Market-Valuation-Based Tactical Asset Allocation Strategies" - December, 2011