Edward Geoffrey Sella, CPA/PFS, CFP® Resume

Edward Geoffrey Sella, CPA/PFS, CFP®
Email Address: esella@spcfinancial.com

• UNDERGRADUATE EDUCATION •

May, 1980 | B.S. – Accounting | Marquette University, Milwaukee, WI

• PROFESSIONAL EXPERIENCE •

May, 1980 to November, 1984 | Mutual of New York | Life and Health Insurance Agent
Registered Representative | MONY Securities Corp.

Responsibilities included estate and income tax planning for high net worth individuals in the Columbia and Towson, MD agency; employee benefit planning for small to medium sized businesses; along with various risk management strategies.

April, 1982 to February, 1983 | Sella, Kinkel, Sella | Partner

Predecessor firm to Sella, Kinkel, Sella, Meyers and Associates.

May, 1982 to September, 1983 | Estate Investment Company

Registered Representative / Primarily an affiliation to clear stock, bond and mutual fund transactions.

September, 1982 to February, 1988 | USLICO Securities Corporation | Registered Representative

Primarily an affiliation to clear the sale of Bankers Security Variable Life products.

October, 1983 to Present | Sella, Kinkel, Sella, Meyers and Associates | President and Director

Corporation was established to provide business owners with a full range of financial services including estate planning, income tax planning, fringe benefits planning, group health and life benefits, and risk management.

September, 1983 to January, 1989 | SPC Financial, Inc. | Vice President
January, 1989 to Present | SPC Financial, Inc. | President & CEO

Corporation was established to provide financial services to individuals and professional corporations. Services also include investment and financial planning, estate tax planning, pension and profit sharing plans, portfolio allocation, income tax planning, and executive compensation planning.

October, 1983 to Present | Raymond James Financial Services | Registered Principal

Primarily a full service brokerage firm for securities transactions.

August, 1990 to March, 1999 | TRI Seminars, Inc. | Director

Corporation was created to provide tax-planning seminars nationwide.

January, 1994 to December, 1999 | Doyle, Schultz & Sella, P.C. | Principal

Corporation was created to provide accounting and income tax preparation services.

November, 1999 to Present | Sella & Martinic, LLC | Partner

*Firm created to provide accounting, income tax preparation and estate tax preparation.

October, 2007 to Present | SPC Insurance, LLC | Partner

Firm created to sell non-variable life and health insurance policies.

SPC Financial®
Finance on a Human Level®

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• PROFESSIONAL ACTIVITIES •

Vistage International Member | Executive Leadership Program

The Girl Scouts, Nation's Capital | Finance Committee Member

The Greater Bethesda Chamber of Commerce

Rockville Chamber of Commerce

Bethany-Fenwick Area Chamber of Commerce

Lewes Chamber of Commerce

Rehoboth Beach - Dewey Beach Chamber of Commerce

• FORMER COMMUNITY CONTRIBUTIONS •

Middlesex Beach Association

President | Board Of Directors

Montgomery County Youth Commission

Maryland Governor's Youth Advisory Council

Started Marquette's Chapter of the Society for the Advancement of Management

Vice President | President

Beta Alpha PSI (Honorary Accounting Fraternity)

Tutorial Committee | Tax Service Committee

American Lung Association of Maryland

Fundraising and Tour Guide Leader | Planned Giving Committee | Seminar Speaker

Seminar Committee | Organization Committee – Celebrity Waiter's Luncheon

Maryland Association of CPAs

Federal Taxation Committee

Potomac Rotary

Polio Plus Committee | International Service

Treasurer | International Youth Projects

International Association of Financial Planners

Institute for Certified Financial Planners

• PUBLIC SPEAKING •

Rockville Chamber of Commerce

National Association of Retired Federal Employees

WCTN, WRC, NBC, WPGC (Radio broadcast to the greater Washington, DC area)

Junior Achievement – Thomas S. Wootton High School

Co-Talk Show Host for "Your Money" on WRC Radio from the late 80s to early 90s