

EDWARD GEOFFREY SELLA, CPA/PFS, CFP® RESUME

Edward Geoffrey Sella, CPA/PFS, CFP®

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• 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.



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Finance on a Human Level®



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— Securities offered through —
Raymond James Financial Services, Inc.
MEMBER FINRA/SIPC

EDWARD GEOFFREY SELLA, CPA/PFS, CFP® RESUME

• PROFESSIONAL ACTIVITIES •

Vistage International Member | Executive Leadership Program
The Girl Scouts, Nation's Capital | Finance Committee Member
The Girl Scouts, Nation's Capital | Board of Directors
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

*Investment advisory services offered through SPC Financial® (SPC). SPC and Sella & Martinic, LLC (S&M) are not registered broker/dealers and are independent of Raymond James Financial Services, Inc. (RJFS). RJFS & SPC do not provide tax or legal advice. *Tax services and analysis are provided by the related firm S&M through a separate engagement letter with clients.*