

# 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 September, 2024 | 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 December, 2024 | Sella & Martinic, LLC | Partner

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

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

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



**SPC Financial**<sup>®</sup>  
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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

*Investment advisory services offered through SPC Financial, Inc.*