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, 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 purchase orders.

September, 1982 to February, 1988 | USLICO Securities Corporation | Registered Representative
Primarily an affiliation to clear the sale of Bankers Security Variable Life.

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 *income tax preparation, 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.

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.

November, 1999 to Present | Sella & Martinic, LLC | Member
**Firm created to provide accounting, income tax preparation and estate tax preparation.*

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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.*

March 2020

SPC Financial®
Finance on a Human Level®

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~ PROFESSIONAL ACTIVITIES ~

Vistage International Member | Executive Leadership Program

Middlesex Beach | Past President & Board Of Directors Member

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

~ COMMUNITY CONTRIBUTIONS ~

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

Bethesda Chevy Chase Chamber of Commerce

Rockville Chamber of Commerce

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 – Wooten High School

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