

TESTIMONIALS – HOUSTON 5/20/2020

1. Daniel Michalk dan@waterwaywealth.com, Waterway Wealth Management 281-363-1000

“Thanks for a great session. Probably the best Ethics class I have ever attended. Loved the format.”

2. Michael Neuenschwander rmichaeln@outlookwealth.com, Outlook Wealth Advisors LLC 281-872-1515
Guest/Non-Member “Nice job in getting this done via zoom vs. in person”

3. Don Pannell donpannell@yahoo.com DP Capital Management, Inc. 832-253- Guest/Non-Member
“Well done - thank you!”

4. Allan Riggs allanriggs@tamu.edu Texas A&M University 210-269-3600 FPA Member “Excellent presentation on the new CFP Board Code of Ethics.”

5. Ben Simiskey ben@cpadvisers.com Stegent Equity Advisors, Inc. 281-656-1757 FPA Member Loved the virtual option and the mentimeter interactions!

6. Shelitha Smodic shelitha.smodic@gmail.com Westwood Wealth Management 713-683-7070 FPA Member
Excellent Program!

7. Joseph Harold Williams hwilliams@linscomb-williams.com Linscomb & Williams (713) 201-3430
Guest/Non-Member Well done. Thanks!