Thirty-Three Individuals of Wescott Financial Advisory Group, LLC Complete NAPFA DEI Training & Certificate Program

CHICAGO, IL – November 6, 2023 - The National Association of Personal Financial Advisors (NAPFA) is thrilled to recognize thirty-three individuals who completed NAPFA's DEI Training and Certificate Program this fall.

The NAPFA DEI Training and Certificate program aims to provide NAPFA members and other financial advisors with resources and education around four specific DEI topics: culture, hiring practices, people, and inclusion. The program was designed by financial advisors for financial advisors; specifically, it was curated by NAPFA's Diversity, Equity, & Inclusion Committee. It was created for participants to have a deeper understanding of how they can contribute to growing diversity, equity, and inclusion in the financial planning profession.

The program was offered by Wescott Financial Advisory Group, LLC to its staff members. It began with participants reviewing four on-demand modules, led by DEI experts. Dr. Miranda Reiter Ph.D., CFP® led the module on culture; Dr. Kimberly Watkins, Ph.D. led the module on hiring practices; Dr. James Pogue, Ph.D. led the module on people; and Luis F. Rosa, CFP® EA led the module on inclusion. Participants completed the modules prior to attending an in-person workshop at their firm in Philadelphia, Pa., facilitated by NAPFA members Christopher Cortese, Susan Green, and Mindy Neira.

"Our passions are being in a business of and about people. We have the principles of empathy, respect and inclusion in our hearts and our lives, says Grant Rawdin JD, CFP®, Founder & CEO of Wescott Financial Advisory Group, LLC. "However, our own experiences in life can cause us to miss the richness of diverse views and experiences. NAPFA's program for the leaders and managers of our firm was a fascinating exploration and understanding of how to be better and smarter business people, advisors, and humans."

Congratulations to the following individuals, who are now participants of the largest cohort to complete the program, and represent the first firm to offer it directly to their staff: Margaret Abrams; Andrea Berger; Amber Bentley; Cynthia Bucher; James Ciamacco; Carrie Delgott; Wendy Ellis; Timothy Ferko; Joseph Frazer; Katelyn Friel; Rich Fuiman; Rebecca Iacopelli; Stephanie James; David Lafferty; Sofia Lowenberg; Mark McCarron; Karen McIntyre; Helen Montana; Darlene Palmer; Gregory Pinto; Alex Rawdin; Grant Rawdin; Julia Reynolds; Sean Roberts; David Rueter; Luisa Shah; Lydia Sheckels; Richard Volpe; William Walker; Robert Waskiewicz; Harold Weinstein; Amanda Weldon; and Ralph Wick.

Registration for the next NAPFA DEI Training & Certificate Program will be available in early 2024. For questions and details regarding the program, or if you are interested in providing the program for your firm, please contact Nikki Palluzzi, CAE, NAPFA's Senior Director of Member Services &

Experience, at palluzzin@napfa.org.

About NAPFA

Since 1983, the National Association of Personal Financial Advisors has provided Fee-Only financial advisors across the country with some of the highest standards possible for professional competency, comprehensive financial planning, and Fee-Only compensation. With more than 4,600 members across the country, NAPFA is the leading professional association in the United States dedicated to the advancement of Fee-Only financial planning. Learn more at www.napfa.org.

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