

In practice since 1995, Mary Way, CPA, CFP® and her associate Ron Kelemen, CFP® work as a team for a select group of clients who seek long-term relationships, rather than one-time engagements or transactions. Most of their new clients are physicians, business owners, or other professionals. They work on a fee-only basis.

Through their unique and federally trademarked processes, including *The Planning Vision Process*®, *The Confident Retirement Vision*®, and *The Confident Legacy Vision*®, their mission is to help you reduce your financial dangers, focus on your opportunities, and then provide a plan and a path to help you achieve your goals.

As a CPA, Mary does not prepare client tax returns. However, her knowledge of important tax issues, together with a long business background in banking, insurance, finance, and education, brings an additional perspective to the team approach they use with clients.

Mary has experience and has made contributions in the fields of retirement planning, pension distributions, portfolio administration, and the myriad of complex details that go into preparing financial plans. She has made presentations to other advisors at local and national financial planning conferences on the topics of “Best Practices in Financial Planning” methods of modeling retirement projections, and conflicts between estate planning and retirement planning.

#### QUALIFICATIONS AND PROFESSIONAL AFFILIATIONS

- Certified Financial Planner™ professional since 1998.
- Oregon Certified Public Accountant since 1988.
- Member, Oregon Society of CPAs.
- Member, Oregon Financial Planning Association (FPA).
- Member, National Association of Personal Financial Advisors.
- Advisory Associate, The H Group, Inc., an independent SEC registered investment advisory firm.
- President, Willamette Valley Estate Planning Council.

#### EDUCATION AND OTHER EXPERIENCE

- MA, University of Illinois at Urbana-Champaign, 1976.
- BA, University of Minnesota, 1973 – Educational Psychology and Journalism double majors, magna cum laude.
- Certified Financial Planner™ certification, College for Financial Planning, 1998.
- Financial manager/controller for several Oregon banks.
- Public accounting service, Touche Ross (now Deloitte & Touche), Portland, Oregon.
- Ongoing professional education courses and conferences, usually 30-60 hours per year.
- Speaker, annual “Leave a Legacy” forum.

#### COMMUNITY SERVICE

- Downtown Salem Rotary, past board member and various active committee service.

#### PERSONAL

- Born and raised in Minnesota, Oregon resident since 1975.
- Married 14 years to husband Steve, mother of two stepchildren.
- Enjoys international travel, gardening, yoga, sailing, and fitness.