

In practice since 1981, Ron Kelemen, CFP® and his associate Mary Way, CPA, CFP® work as a team with 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.

Ron has been quoted in *The Wall Street Journal*, *Business Week Online*, *WSJ.com*, *The Oregonian*, *The LA Times Research Magazine*, *Physicians' Financial News*, *The Journal of Financial Planning*, *Investment Advisor*, *Financial Planning*, *USA Today*, *The Statesman-Journal*, *The Oregon State Bar Bulletin*, *Portland Magazine*, *Wealth Manager*, *Morningstar* plus other professional journals and newsletters. He has also provided background information for *Money*, *Business Week*, and *CNBC.com*.

Ron loves to write. He is a contributing author to three special edition financial planning reference books. The latest, published in 2005, is *Living and Learning – Achieve Retirement and Education Security*.

Since 1992, Ron has authored *The Kelemen-Way Financial Perspective*, a widely quoted quarterly commentary on planning strategies and financial news. He also writes a monthly column in *ChartNotes* for the Marion-Polk Medical Society, and for *MPY* for the local dental society.

Ron also likes to teach. He periodically conducts advanced seminars for CPAs, attorneys, financial advisors, doctors, and board members of several charities.

QUALIFICATIONS AND PROFESSIONAL AFFILIATIONS

- Certified Financial Planner™ professional since 1984.
- Founding board member and past president, The Oregon Society, Institute of Certified Financial Planners (ICFP) (Now called The Financial Planning Association).
- Advisory Associate, The H Group, Inc., a SEC Registered Investment Advisory Firm.
- Willamette Valley Estate Planning Council (former President).
- Member, The Financial Planning Association (past Oregon board member).
- Member, National Association of Personal Financial Advisors.

EDUCATION AND OTHER EXPERIENCE

- Master of Public Administration, Syracuse University, 1974.
- Bachelor of Science, Lewis and Clark College, 1973.
- Certified Financial Planner™ certification, College for Financial Planning, 1984.
- One of the first advisors nationwide to qualify for and be admitted to the former Registry of Financial Planning Practitioners in 1984.
- Ongoing professional education courses and conferences, usually 30-60 hours per year.
- Budgeting, finance and management, City of Salem, 1974 - 1978.

COMMUNITY SERVICE

- Chair, Willamette Academy Advisory Board.
- Founding board member and past president, Medical Foundation of Marion and Polk Counties.
- Recipient of Salem Rotary's First Annual Outstanding Service To Youth Award, 2004.
- President, Salem Rotary 2008-2009, active Rotarian since 1984.
- Past service includes board or officer positions with the Salem Public Library Advisory Board, Marion-Polk Food Share, Salem Rotary, Oregon Symphony Association in Salem, The 24-J School District Fiscal Services Task Force, Salem-Keizer School Board's Bond Steering Oversight Committee on \$177 million capital improvement bond issue, mentor to three boys, and various fund raising committees.
- Peace Corps volunteer with wife Kathy in Malaysia, 1978 - 1980.

PERSONAL

- Maintains a close family life in Salem, Oregon.
- Married 32 years.
- Two daughters, one attending London School of Economics, the other working in Boston in the field of epidemiology.
- Host parent, guardian, and guarantor for an exchange student from Uzbekistan, now at the Drexel University Nursing School.
- Enjoys snowboarding, cooking, bicycling, mentoring, camping, travel, reading biographies, and following current events.