LINDA LUBITZ BOONE, CFP®

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SUMMARY

Linda Lubitz Boone, CFP is the founder of the financial planning firm The Lubitz Financial Group. She provides fee based personal financial planning and investment advisory services for individuals and investment advisory services for Pension Plan trustees. She has been named "One of America's Best Financial Advisors" by Worth Magazine for over 10 years, and was profiled as a "South Florida Honcho" in South Florida Magazine. She has also been consistently selected as "One of the Top Financial Advisers for Doctors" by Medical Economics Magazine. Blomberg Wealth Manager has also regularly recognized the firm as one of the Top Wealth Management Firms in the county. She is also the c-author of Creating an Investment Policy Statement: Guidelines and Templates, published by FPA Press. She has recently launched, as co-founder, IPS AdvisorPro™, an online investment policy statement application for the professional wealth manager, at www.IPSAdvisorPro.com which was named by Morningstar as the "Best Software of 2006". She is married to Norm Boone, President of Mosaic Financial Partners in San Francisco and partner in their software company. A personal achievement she is especially proud of is summiting Mt. Kilimanjaro in 2004.

PROFESSIONAL EXPERIENCE

2006 – Present	IPS AdvisorPro™, a web based software to create Investment Policy Statements. *Co-Founder and arnte*
1999 – Present	THE LUBITZ FINANCIAL GROUP, MIAMI, FL *Founder and President*
2003 – Present	MOSAIC FINANCIAL PARTNERS, SAN FRANCISCO, CA *Managing Director, East Bay Region*
1993 – 1999	WOOLF, LUBITZ AND FOLDES, MIAMI, FL *Co-Founder and Partner*

1996 – Present	CAPSTONE GROUP, a consortium of the top financial planning firms in the United States *Co-Founder*
1988 – 1993	EVENSKY & BROWN, FINANCIAL ADVISORS, MIAMI, FL *Partner*
1984 – 1988	AMERIFIRST SECURITIES CORPORATION, MIAMI, FL *Founder and President*
1972 – 1984	AMERIFIRST FEDERAL/FIRST FEDERAL OF MIAMI, MIAMI, FL

EDUCATION AND PROFESSIONAL DESIGNATIONS

1988 – 1990	COLLEGE FOR FINANCIAL PLANNING, DENVER, COLORADO *Certified Financial Planner certification*
1993 – 1994	QUANTUM INSTITUTE FOR PROFESSIONAL DIVORCE PLANNING *Certified Divorce Planner*
1970 – 1974	AGNES SCOTT COLLEGE, UNIVERSITY OF MIAMI, FLORIDA INTERNATIONAL UNIVERSITY *BA Economics*

PROFESSIONAL AFFILIATIONS AND COMMUNITY SERVICE

- Member, Golden Gate University Financial Planning Advisory Committee
- Task Force, Retreat 2005, Financial Planning Association
- National Board of Directors 1999- 2002/Financial Planning Association and Chairperson of the 1996 IAFP Conference for Advanced Planning.
- TIAA-CREF Institute Advisory Board, Emeritus.
- Editorial Advisory Board, <u>Journal of Financial Planning</u>.
- Rotary Club of Miami, Past Board of Directors and member of Investment Management Committee for the McClelland Trust. This Trust has provided over $2.5 million in medical school scholarships.
- Historical Association of Southern Florida, Treasurer, Trustee, and member of the Historical Association Foundation Investment Management Committee.
- Planned Giving Council of Miami-Dade, President for 1997-98. Current Board Member
- Miami Forum, Past President.
- Former Board of Directors, Friends of WLRN Radio (National Public Radio).

PUBLICATIONS AND HONORS

- Co-Creator of IPS AdvisorPro™, a web based software application for advisors.
  - Morningstar Best Software of 2006 award winner.

- Co-author Investment Policy Statements – Guidelines and Templates, published by The Financial Planning Association. 2004

- Quoted frequently in the press, including *The Wall Street Journal*, *FORTUNE*, *Kiplinger's Personal Finance Magazine*, *Newsweek*, *The Miami Herald* and other national publications.

- Frequent speaker and lecturer at the University of Miami Graduate Law School.

- Emeritus Faculty member of the Florida Bankers Association Trust School.

- Co-Author of The Investment Policy Guidebook, published by Ibbotson Associates.

- Co-Author of The Hows and Whys of Investment Policy Statements, *Journal of Retirement Planning*, November, 1998.

- Selected as a "Business Leader", *The Daily Business Review*, February, 1995.

- Selected as a regular contributor to *The Miami Herald*'s "Ask the Experts" column.

- Difficult Policy Issues in Investment Policy Statements, *Journal of Financial Planning*, May, 2003.

- Investment Policy Statements Protect Advisers When Markets Go Sour, *National Underwriter*, August, 1996.

- Retirement Plans for Small Businesses, *South Florida Business Journal*, March, 1995.

- Developing the Investment Policy Statement, *Journal for Financial Planning*, April, 1992.