The Monitor Group Inc.
Wealth Management

Glenn G. Kautt, CFP®, EA, AFIA®
President, Chairman, Chief Investment Officer
The Monitor Group, Inc.

BIOGRAPHY

Engaged in financial planning and consulting since 1981, Glenn Kautt received his MBA from Harvard Business School and is a President's Distinguished Scholar graduate of Purdue University.

He is a member of the Financial Planning Association, the National Association of Enrolled Agents, is a Graduate Fellow of the National Tax Practice Institute and an Accredited Investment Fiduciary Analyst. He is a former Chairman of the Financial Planning Association of the National Capital Area (FPANCA).

He is a member of the Board of Trustees and chairs the Investment Committee for the Foundation for Financial Planning. He has been named repeatedly by *Barrons, Worth, Mutual Funds* and *Medical Economics* magazines as one of the nation's top investment advisors. *Washingtonian* magazine recently again named Glenn to their list of top financial professionals in the greater Washington, D.C. metro area. J.K. Lasser's *New Rules for Estate and Tax Planning* continues to note Glenn on their "Top Professional Advisor" list. Glenn's management of the firm led it to be named as one of the "Best Managed Financial Planning Firms" in the US in independent surveys for four years in a row, an accomplishment shared with less than a dozen other firms across the nation.
Glenn is a recognized author, speaker and expert in advanced financial planning techniques. He is a regular columnist for the industry's leading publication, *Financial Planning* magazine. A former member of the Editorial Advisory Board for the *Journal of Financial Planning*, he has four professional contributions published in the Journal. He authored the book *Stochastic Modeling: The New Way to Predict Your Financial Future*, a chapter in *The Invincibility Shield for Investors* with other leading financial planners, and contributed to *Secrets of the Wealth Makers* by Michael Lane.

Glenn has appeared on national television including PBS, CNBC, CNN, Fox News and Bloomberg, and is regularly quoted in financial industry publications, *USA Today, Newsweek, The Wall Street Journal* and other publications. Presenting to audiences for over 40 years, he speaks on advanced financial planning and wealth management topics to professionals across the country.

Glenn oversees the firm's day-to-day operations, chairs the firm's Investment Committee, and serves as Chief Compliance Officer. Formerly, Glenn was principal in several other planning firms, and served as a U.S. Navy Surface Warfare Officer.

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Cal Brown, CFP®, MST
Vice President of Planning
The Monitor Group, Inc.

BIOGRAPHY

Cal Brown has over 25 years of experience in the financial services field. He received his Masters of Science in Taxation at American University in Washington, D.C., and graduated cum laude from the University of Arkansas with a bachelor's degree in Business Administration.

Cal is a member of the Financial Planning Association and past Chairman of the National Capital Area Chapter (FPA-NCA), and recently received the Norma Severns Leadership Award for extraordinary efforts on behalf or for the benefit of the local Chapter.

The *Washingtonian* magazine recently named Cal as one of the top 33 financial planners in the greater Washington, D.C. metro area. Mr. Brown has three professional contributions published in the *Journal of Financial Planning* and has authored articles appearing in *Wealth Manager* and *Financial Planning* magazines. He has appeared on CNBC, Fox 5 DC, the PBS "Nightly Business Report," WAVA-FM (Washington, D.C.), and has been featured in the *Wall Street Journal.* He has also been quoted in *Kiplinger's Personal Finance* magazine, *Smart Money, Newsweek, U.S. News and World Report*, *CNNfn, Financial Planning* magazine, *Mutual Funds* magazine, and *Investment News*.

Cal manages all planning efforts and special projects including conducting financial analyses for clients, is a member of The Monitor Group's Investment Committee, and serves as a relationship manager for many of the firm's clients. Cal is also responsible for the firm's operations in the President's absence.

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Kenneth C. Robinson, CFP®, MS
Senior Planner
The Monitor Group, Inc.

Ken Robinson has more than 15 years of experience in the financial services industry. He graduated with a bachelor's degree in Economics from the Virginia Military Institute and earned his Master's of Science in Finance from Georgia State University.

Ken is a member of the national Financial Planning Association, and serves on the Board of the Financial Planning Association of the National Capital Area (FPANCA) as Pro Bono Director, having previously served as the Director of Public Relations.

He has been quoted in the Washington Post, Investment News, and various industry publications, as well as appearing on CNN Newsource. Ken is active in pro bono financial planning efforts and he is a volunteer for Junior Achievement of the National Capital Area in the financial literacy programs for local schools. He is a former adjunct professor for Virginia Commonwealth University's CFP® certificate program.

As Senior Planner, Ken works with clients in all aspects of integrated wealth management, including investment management, financial planning analyses, tax planning and preparation, philanthropic giving, estate planning and other complex financial issues. Ken has served on the firm's Investment Committee since 1998.

Ken served as Director of Operations prior to his current role as Senior Planner. Prior to entering the financial planning field, he taught high school mathematics and economics and coached cross-country, and track and field.

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IN THE NEWS

The professionals of The Monitor Group, Inc. are regular contributors to popular consumer and industry media. As experts in an array of financial planning issues, they provide commentary, opinion, and guest-written content to dozens of outlets annually.

Professionals of The Monitor Group, Inc. have appeared in the following media outlets:

Boomer Market Advisor

Bloomberg Wealth Manager

Kiplinger's Personal Finance

Newsweek

Northern Virginia Magazine

Medical Economics Magazine

Mutual Funds Magazine

Readers Digest

Smart Money

Ticker

US News and World Report

Washingtonian

Worth Magazine

The Business Review

Dow Jones Fee Advisor

Financial Planning

Financial Product News

International Association for Financial Planning Newsletter

Investment News

Journal of Financial Planning

The Journal of Investing

Journal of the American Association of Individual Investors

Medical Economics

National Association of Personal Financial Planners

ABC Channel 7

Bloomberg TV

CNBC's Power Lunch

CNN Newsource

Fox News

News Channel 8

PBS's Nightly Business Report

WUSA Channel 9

The Monitor Group was also listed among the top financial advisors in *Financial Advisor, Wealth Manager*, and *Medical Economics* magazines. The following is a selection of quotes attributed to professionals of The Monitor Group from the past year:

US News & World Report
"The New Rules On Gifts"
By Paul Lim

"Presuming that you name a child as the beneficiary of your Roth IRA, he or she could withdraw the money over possibly four or five decades-maximizing the account's tax benefits over two generations. Though this new law won't go into effect until 2010, you can effectively prepare for the conversion by fully funding your traditional IRAs, says Cal Brown, vice president of planning at The Monitor Group, a wealth management firm in McLean, VA."

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CONTACT US

The professionals at The Monitor Group, Inc. are available to members of the media looking for expert opinion and commentary on issues pertaining to affluent individuals and families. If we can be of assistance to you, please contact the following representative:

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