



AAAA ANNUAL NATIONAL  
V.I.S.I.O.N. CONFERENCE 2022

# > REUNITED

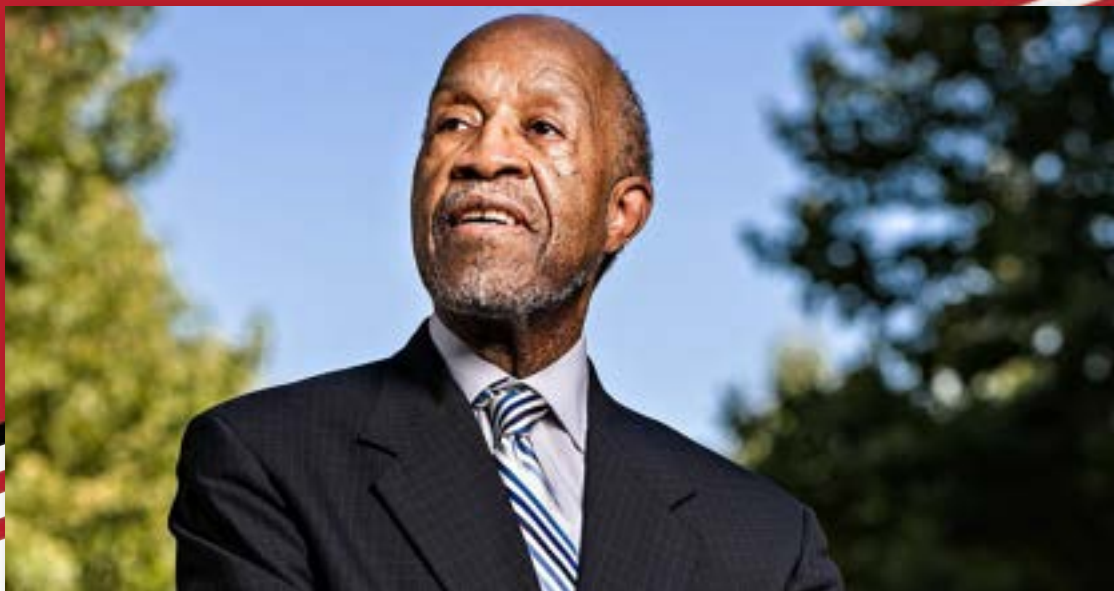
*RECONNECT. REENGAGE. REENERGIZE.*

SEPTEMBER 19-22, 2022 | HYATT REGENCY - ATLANTA, GA

CONFERENCE GUIDE



# FOUNDER **Spotlight**



**LeCount R. Davis, Sr.** earned the Certified Financial Planning designation granted by the College for Financial Planning in Denver, Colorado, becoming the first African American so designated. He is a licensee of the Certified Planner Board of Standards. For over six years he published a quarterly financial education newsletter, "Finance and the African American Family."

Mr. Davis has Bachelors and Masters degrees in Accounting and additional training and extensive experience in accounting, tax planning, financial planning, and financial management and investment consulting. His experience in both the public and private sectors includes several years as a Senior Consultant with a Washington, DC-based CPA firm. He also served as Assistant Director of Finance for an international labor organization, concentrating in the Caribbean and South America. He has appeared as a financial expert on many television programs and at many programs discussing financial planning and financial advisory issues.

In 1970, Mr. Davis, established his own consulting firm specializing in tax planning, small business management, financial planning, financial management and investment consulting. His personal client portfolio includes national organizations, international labor unions, pension funds, individuals, small businesses, religious organizations, investment clubs, and other entities. He has served as a lecturer in Accounting at Howard University, in Washington, DC, and in Financial Management in Howard's School of Continuing Education. He hosted the financial television program, Common Cents for station WHMM, whose call letters are now WHUT.

His many professional accomplishments have been recognized by his peers and other financial experts.

# ABOUT



The ASSOCIATION OF AFRICAN AMERICAN FINANCIAL ADVISORS (AAAA) was created to address the needs and concerns of African American Financial Professionals.

AAAA is a non-profit membership organization for African American financial advisors and affiliated professionals. We work in alliance with academic leaders at HBCUs that support financial planning degree programs, legislative and regulatory bodies, financial services firms and consumer interest organizations.

AAAA fosters the value of financial planning and advances the financial planning profession.

## Our Vision is Clear:

The Association of African American Financial Advisors envisions a future where the Black community is financially savvy with expert guidance to sustain generational wealth.

## Our Mission is Aligned:

The Association of African American Financial Advisors serves to expand the community of successful Black financial professionals.

## Our Values Guide Us:

Strengthen the community of members through access to information, resources and practices that positions the professionals for success.

Respecting the experience of black financial professionals and investing in ways that grows each member and partner that shares our mission and vision.

Providing members with access and the opportunity to build their financial acumen, credentials and network to build the career of their dreams.



# Sponsors & PARTNERS

The Association of African American Financial Advisors offers numerous corporate marketing opportunities through partnerships. Our corporate sponsors are eligible to conduct webinars, emails, and LinkedIn messages to members subject to select sponsorship levels. Sponsors are also able to host keynote speakers, presenters, and panelists at the AAAA annual conference and regional member events. AAAA offers discounted group pricing for employees of corporate sponsors based on volume.

The 2022 V.I.S.I.O.N. Conference would not be possible without the partnership and sponsorship of the following corporations and entities. We are honored to have their support and representation!

## SPONSORS



## PARTNERS



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Please share  
 your conference  
 experience across our  
 social media platforms.



Also use & explore our hashtags!: #AAAF A #AAAFACONF

# A Letter from the Chairman

20 YEARS  
AAAA  
ASSOCIATION OF AFRICAN AMERICAN  
FINANCIAL ADVISORS  
SHAPING THE FUTURE



Hello everyone,

Let me first say it was great to be back in-person with you in Atlanta! After two long years of virtual meetings and V.I.S.I.O.N. Conferences, it feels great to be back with my AAAA family!

Much has changed since AAAA's 2019 V.I.S.I.O.N. conference in Detroit. We have overcome a once in a lifetime pandemic, started new conversations about racial justice and increasing the number of Black/African American Financial Professionals in the Industry. Just this year, we are coming to terms with inflation and the impacts of a volatile stock market on our clients as well as our investment portfolios. We're also seeing the rise and adoption of Blockchain technology that may change the way we do business forever.

Considering all that's happened, the good and the bad, our goal for 2022's conference was simple: to be a source of inspiration and engagement for the over 500 conference registrants and attendees.

Your conference planning team carefully curated sessions and panel discussions that hopefully inspired you to reconnect with your passion for helping others, reengage with your colleagues in the industry and reenergize yourself considering the many possibilities that lie in front of you. Like many of you who were a part of this year's V.I.S.I.O.N. conference, I learned a lot from each session I attended. The three sessions that left me inspired were: The State of Black Wealth Fireside Chat, The Presidents of Wealth Roundtable Discussion, and the Leaders of DEI panel discussion.

From the emails, comments, and survey questions conducted following the conference's end, I'd say we accomplished our goal and then some. To our esteemed attendees, our Founder & Chairman Emeritus, and our corporate partners, I want to take a moment to express my sincerest gratitude for your contribution to making the 2022 AAAA V.I.S.I.O.N. Conference a tremendous success.

I hope you share my sentiment that the V.I.S.I.O.N. Conference is a relevant resource for empowering not only the industry's trailblazers, but its legends as well. I hope you walked away with a vantage point of clarity for how you can help change the framework for wealth building not only in your individual community, but in some capacity, in the black community as a whole. You play a dynamic part in helping institutions and individuals alike, sustain legacy as well as create it.

Your support of AAAA and the V.I.S.I.O.N. Conference is appreciated far beyond this note's ability to convey. We look forward to you joining us for the next conference and trust that you'll literally, "share the wealth" by telling a friend, colleague, or family member about your experience.

Your colleague & Chairman,

*Christian Nwasike*

MFP®, MBA, JSM, CRA®, CLC, CTC, MSI Fellow™

# WELCOME TO

# Atlanta



## Greetings:

As the 61st Mayor of Atlanta, it is my pleasure to join the Association of African American Financial Advisors in welcoming attendees to the 2022 Annual V.I.S.I.O.N. Conference.

Since its inception, the Association of African American Financial Advisors (AAAA) has served to expand the community of successful Black financial professionals. It has also fostered the value of financial planning and advanced the financial planning profession.

As a major hub for financial and business growth, Atlanta is at the forefront of trailblazing a more diverse and inclusive future. Last year, Atlanta's historically Black colleges received a \$90 million dollar grant to ensure that students of color have the tools and resources to succeed in the financial sector.

The City of Atlanta commends AAAA for your dedication to diversity and inclusion within the financial field and your continued support for Black owned businesses. We are incredibly grateful that you have chosen our city to host your unique and dynamic conference.

While you are visiting our world-class city, we hope you explore some of our incredible attractions. Consider spending time at the National Center for Civil and Human Rights, Centennial Olympic Park, the Georgia Aquarium, the World of Coca Cola, Atlanta Botanical Garden, and many more.

On behalf of the people of Atlanta, I offer best wishes for a memorable and successful event.

Sincerely,

Mayor Andre Dickens



## Andre Dickens

61ST MAYOR OF  
ATLANTA, GEORGIA

**A warm**

# Georgia

**WELCOME**



**Brian P. Kemp**

GEORGIA'S 83RD GOVERNOR



To: The Association of African American Financial Advisors

GREETINGS:

On behalf of the state of Georgia, allow me to extend my warmest regards to as you host and participate in your V.I.S.1.0. N. Conference.

Please allow me also to welcome your distinguished guests, honorees, their families, and other attendees.

I send my best wishes for a productive event!

Sincerely,

A handwritten signature in white ink that reads 'B.P.K.'.

Governor Brian P. Kemp



# CONFERENCE ITINERARY

# MONDAY

## SEPT 19

**20** YEARS  
AAAA  
ASSOCIATION OF AFRICAN AMERICAN  
FINANCIAL ADVISORS  
SHAPING THE FUTURE  
**AAFAINC.COM**



3:00pm - 5:00pm  
CFP & CIMA Ethics Session - Crystal Alford-Cooper

3:00pm - 5:30pm  
Career Fair  
*Embassy Hall*

5:30pm - 7:00pm  
Pre-conference Networking Reception & LeCount and Jewel Davis  
Book Signing - Sponsored by AAAA in partnership with TIAA  
*Embassy Hall*

# CONFERENCE ITINERARY

## TUESDAY SEPT 20



Breakfast/Networking - Embassy Hall  
7:00am - 8:15am

General Session 1  
General Information & Chairman's Update  
8:00am - 8:15am

General Session 2  
AAAA True Talk - J.P. Morgan  
International Ballroom  
8:20am - 8:35am

General Session 2  
Strategies Available At J.P. Morgan Chase & Co. To Expand and Grow The  
Number of B/AA Financial Advisors in the Industry. Managing Director -  
Divisional Director, JPMorgan Securities LLC & Keith Henry Regional  
Director JP Morgan Securities  
International Ballroom  
8:35am - 9:35am

Mid-morning Break - Embassy Hall  
9:35am - 9:45am

General Session 4  
AAAA True Talks - The Capital Group  
International Ballroom  
9:45am - 10:00am

General Session 5  
Be Prepared Be Empowered: Key Questions Women Should be Asking to  
Navigate their Financial Futures - Leslie Geller J.D., LL.M.  
International Ballroom  
10:00am - 11:00am

General Session 6  
DEI Efforts of the Securities &  
Exchange Commission  
[SEC] - Robert A. Marchman Esq.  
Sr. Policy Advisor on Diversity & Inclusion  
International Ballroom  
11:05am - 11:35am

Breakout Session 1  
AAAA True Talks: Merrill + RW Baird + Principal  
International Ballroom  
11:40am - 12:25pm

Working Lunch + Networking - Embassy  
12:30pm - 1:30pm

*BREAKOUT SESSIONS: 1:40pm - 2:30pm  
Please Choose a Session To Attend*

[Panel Discussion]: Next Gen Talent: Know Your Worth- Career  
Opportunities in Wealth Management. Fidelity + Merrill + NAPFA

[Panel Discussion]: ESG: Does It Really Generate Alpha In a Client's  
Portfolio? Schwab + Allan Boomer + Commonwealth + LPL

[AAAA True Talks]: Ethic + Ally + Raymond James and Black Financial  
Advisors Network: You Belong Here -Chris Fils, CFP® MBA, Complex  
Manager Raymond James

Strategies Available to Manage Intergenerational Wealth For Financial  
Planners FPA GA + RW Baird

General Session 5  
AAAA True Talks: One PIMCO Portfolio Manager's Career Journey Grover  
Burtney [PIMCO]  
2:40pm - 2:55pm

*BREAKOUT SESSIONS: 4:00pm - 4:50pm - Please Choose a Session To Attend*

[Panel Discussion]: The Intersection of Fashion, Entertainment and Wealth;  
How Financial Advisors Can Support Creatives - Kenneth Boggs + Tyler  
Perry Studios + Morgan Stanley

[AAAA True Talks]: TIAA + UBS + Citi

[Panel Discussion]: Investment and Tax Planning Strategies for HNW Clients  
in Volatile Markets. Sharif Mohammed CFP, CPA Unlimited Financial Svcs,  
Andy Folsom WFA, Devin Ekberg CFA PIMCO

[AAAA True Talks]: Retirement Planning: Visualize Retirement Program - T.  
Rowe + Guggenheim + LPL

Networking Reception: *Exclusive to Sales/Distribution Managers in  
Wealth and Asset Management.*

4:00 PM - 4:50 PM Networking Reception: *Exclusive to Leaders of DE&I in  
Wealth Management.*

General Session 6  
[Fireside Chat]: State of Black Wealth, Nicole Elam CEO NBA, Renita Young  
Bloomberg Beat, Aimee Griffin CEO ABEPP, Courtney Gray CEO HBCUFirst,  
LeCount Davis Founder AAAA, NASP  
4:55pm - 5:50pm

Social Event [Dine-A-Round]: Dinner w/AAAA's Corporate Partners For  
Registered Conference Attendees  
6:00pm - 8:30pm

# CONFERENCE ITINERARY

## WEDNESDAY SEPT 21

Breakfast/Networking - Embassy Hall  
7:00am - 8:15am

*BREAKOUT SESSIONS: 8:20am - 9:10am  
Please Choose a Session To Attend*

[Panel Discussion]: Financial Planning Strategies for those with Special Needs Desi Wyatt Citi + TIAA + Ally

*[Exclusive to Sales Managers/Leaders/ of Sales Teams]* Transitioning from Sales Producer to Manager; What Sales leaders Need to know about Motivating Diverse Sales Teams - Chuck Webb CEO Nucleus Assurance Group

[Panel Discussion]: The Intersection between Sports and Wealth; How Financial Advisors Can Support Athletes. Nolan Carrol, Donovan Darius, Gary Charles, Renee Montgomery, Glen Rice, Victor Obaika

[Presentation]: Do Diverse Asset Managers Perform Differently When Compared to Non-Diverse Asset Managers? Richard Turnley III Chairman BOD NASP + Guggenheim

[AAAA True Talks]: AAAA + RBC Wealth Management True Talk: Helping Clients Thrive and Communities Prosper + Wells Fargo Advisors

Morning Break/Networking - Embassy Hall  
9:10 AM - 9:45 AM

General Session 1  
[AAAA True Talk]: Leveraging the Benefits of Partnering with Black/African American Wholesalers - Marlon Hall Founder/President AWD  
International Ballroom  
9:45 AM - 10:00 AM

General Session 2  
The U.S. 2023 Economic Outlook: Definitely, Mostly, Maybe. Paul White Ph.D. CAIA, Chief Investment Officer at Trinary Capital  
International Ballroom  
10:00 AM - 11:00 AM

General Session 3  
Presidents in Wealth, Round Table Discussion: Increasing Career Advancement Opportunities into the C-Suite For Black Financial Professionals [No Press Allowed].  
International Ballroom  
11:05 AM - 12:30 PM

### General Session 4

[Working Lunch + Panel Discussion]: Advancing Diversity, Equity and Inclusion in the Wealth Management Industry: The Opportunity, Challenges and the Path Ahead. Moderator: Raymone T. Jackson Global Head of D&I T. Rowe Price, Scarlett Abraham VP Chief Diversity Officer Commonwealth, Sui Lang Panoke SVP DEI  
Zions Bank - Embassy Hall  
12:35 PM - 1:35 PM

Afternoon Break/Networking - Embassy Hall  
1:35 PM - 1:50 PM

General Session 5  
[AAAA True Talk]: The Power to Deliver for your Clients - Harold Williams, CPFA Senior Vice President, Wealth Management Advisor Mary Robinson Financial Advisor, Don Smith Director, Business Strategies and Initiatives Executive  
International Ballroom  
1:50 PM - 2:05 PM

General Session 6  
[Merrill Lynch] The Power to Lead Aubrey Lee, Senior Vice President & Sales Manager, Linda Davila First Vice President, Wealth Management Advisor, Darric N. Boyd, CFP®, C(k)P® AAMS®, CPFA Senior Vice President Financial Advisor, Adrienne Hughes National Client Experience Executive, Christopher Jay, CPWA®, CPFA Senior Vice President, Wealth Management Advisor.  
Moderator: Andy Sieg President, Merrill Lynch Wealth Management  
International Ballroom  
2:05 PM - 3:05 PM

*BREAKOUT SESSIONS: 3:10 PM - 4:00 PM  
Please Choose A Session To Attend*

[Presentation]: Charitable Giving and Estate Planning Strategies for Affluent Families - Aimee Griffin Esq. Founder ABEPP + Capital Group  
International Ballroom

[Panel Discussion]: [Tech Panel] How AI is enhancing Comprehensive Financial Advice. Devon Drew, Anthony Buchanon + Imari Oliver + Morgan Stanley

[Panel Discussion]: [Business Development] Scale Up Your Practice: Branding Strategies for HNW and HIENRY Prospects. XYPN + Principal Funds + Nkrumah Pierre Managing Director Eisner Advisory Group LLC

[AAAA True Talks]: Solomon Davis III First Vice President, Sub-Complex Manager, Morgan Stanley| Beyond the checkmark of DEI - What are some actionable next steps Scarlett Abraham Clarke Chief Diversity, Equity and Inclusion Officer at Commonwealth Financial Network| Advancing a Purpose Driven Culture for Clients, Colleagues, & Communities Rhonda Jones, CFP®, AAMS® Financial Advisor, Edward Jones. Techwood

[AAAA True Talks]: Who we are and how we help FAs Pat Feigley & Dan DeBarros [PIMCO] + JP Morgan + Capital Group  
Location: Techwood  
4:00 PM - 4:45 PM

General Social Event: Reception, Banquet and Awards Dinner  
International Ballroom  
6:00 PM - 8:30 PM

# CONFERENCE ITINERARY

# THURSDAY

# SEPT 22



Breakfast/Networking  
Embassy Hall  
7:00 AM - 8:25 AM

**BREAKOUT SESSIONS: 8:30 AM - 9:20 AM**  
*Please Choose A Session To Attend*

[AAAA True Talks]: Fidelity and Diversity Hiring Strategy - Kathy Baynes  
Fidelity + Philanthropy: Navigating Family Philanthropy - Mary Jovanovich Schwab + Wells Fargo Advisors - University

[Panel Discussion]: [Legal Discussion] Employment Law, Company Policy & Industry Regulation; Best Practices For Ethnically Diverse Employees and Employers Chiquita Jackson + Raymone Jackson T. Rowe Techwood

[Panel Discussion]: [Mental Health] Black Experience: Understanding your Mental Health & Impacts of Racial Battle Fatigue on Work Performance Rickie Taylor + Dr. William Smith C.E. Eligible Roswell International Ballroom

[Panel Discussion]: [Women in Wealth] Ways to Engage and Empower Female investors. Cassandra Cyrius Executive Director JP Morgan Chase & Co, Alleson Tate CFP® Founder, Avere Wealth Management, Dr. Dana Palma Financial Advisor Edward Jones International Ballroom

Mid Morning Break/Networking  
Embassy Hall  
9:25 AM - 9:55 AM

General Session 1  
[Panel Discussion]: Conversation with LeCount Davis Chairman Emeritus, AAAA on the Vision for Blacks in Wealth Management + New Board Of Directors Swearing In Ceremony  
International Ballroom  
10:00 AM - 10:45 AM

General Session 2  
AAAA True Talk: Talk: Economy Outlook and Current State of Global Recovery & Investment Opportunities Shawn L. Snyder, Head of Investment Strategy Citi.  
International Ballroom  
10:45 AM - 11:00 AM

General Session 3  
Diversity Equity and Inclusion at Citi - Erika Irish Brown Chief Diversity, Equity and Inclusion Officer and Global Head of Talent Citi.  
International Ballroom  
11:00 AM - 12:00 PM

General Session 4  
[AAAA] Closing Remarks: Raymone Jackson + Reggie Lillie AAAA Memberships Directors| Desi Wyatt + Araya Mesfin CFP® AAAA Corporate partnerships Directors| Rickie Taylor + Alleson Tate CFP® AAAA Conference Planning Co-Chairs.  
International Ballroom  
12:00 PM - 12:20 PM

Black/African American Client Symposium;  
Sponsored by AAAA in partnership with ABEPF  
12:30 PM - 5:00 PM

Breakout #1 Retirement Planning for Business Owners

Breakout #2 Wealth Generational Transfers and Gifting Strategies for B/AA Families

Breakout #3 Save for a Rainy Day - Benefits of Leveraging the Stock Market for Better Returns

Breakout #4 US Economic Update/Recession Proof Your Savings

*\*Please select only one Breakout session to attend during allotted time slots as seating is limited. \*Sessions will be recorded and available for replay within 48 hours of session time in Swapcard*

# 2022 Board of Directors

The Board of Directors is responsible for the overall health of AAAA and handles the day-to-day operations and business affairs, including growth, financial, strategy, and governance. Our experienced Board of Directors provide counsel and oversight while ensuring that AAAA adds value and acts in the best interests of its members, partners and affiliates. The Board works together with the Advisory Council, committees, volunteers, and staff to advance AAAA's strategic plan.



**LECOUNT DAVIS, MBA, CFP®**  
**Founder**



**CHRISTIAN NWASIKE, MFP**  
**Chairman of the Board**



**RICKIE TAYLOR**  
**1st Vice Chairman**



**SHEENA GRAY, MBA**  
**2nd Vice Chairwoman**



**SHARIF MUHAMMAD,  
 MBA, CPA, MST, CFP®**  
**Financial Secretary**



**DESI WYATT, CRPC®**  
**Corporate Partnerships  
 Chairman**



**ARAYA MESFIN, CFP**  
**Corporate Partnerships  
 Co-Chairman**



**RAYMONE JACKSON, CLU,  
 ACS, FLMI**  
**Memberships Chairman**



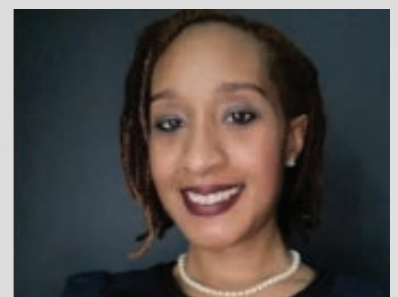
**REGINALD LILLIE II**  
**Memberships Co-Chairman**



**ALLESON TATE, CFP®**  
**Marketing and Public  
 Relations Chairwoman**



**CHIQUITA HALL JACKSON**  
**General Counsel**



**DR. DANA PALMA, AAMS™**  
**Board Secretary**

The Association for African American Financial Advisors is a 100% volunteer organization run by dedicated financial advisors. Without the unwavering support, efforts, and commitments of our members, the AAAA mission and vision is not possible. If you are interested in becoming a committee member please indicate on the AAAA membership application/renewal form how we can best utilize your talents. AAAA limits committee volunteerism to no more than two committees at any given time. AAAA will contact you once your application has been received and approved.

# 2022 Administrative Team



**LATTISHA JACKSON**  
**Lead Program Coordinator**



**CHELSEY JOHNSON**  
**Program Coordinator**



**NECHO CAROLL**  
**Program Coordinator**

# BECOME A MEMBER of AAAA



*“We see you. We **are** you.  
We make your success **our** priority.”*

Association of African American Financial Advisors (AAAA) welcomes qualified individuals in several categories including Advisory, Affiliate, and Student Membership. Membership enables you to participate in several AAAA member-only activities, educational opportunities, and networking events in addition to recognition of your status as an experienced or emerging financial advisory professional.

## BENEFITS OF MEMBERSHIP

The ability to engage in dialogue with peers who can share a diverse perspective that may help to advance your career and business.

Networking opportunities with like-minded African American professionals who understand distinct opportunities that can help you stand apart in a very competitive environment.

Professional development through monthly webinars that include eligibility of CFP® Continuing Education credits

An annual scholarship toward earning your CFP® designation

Regional Networking Events, and an Annual Conference

Membership Directory and Online Community Forum

Showcase your services on the AAAA Consumer Financial Advisor Finder portal\*  
\*The Financial Advisor Finder is limited to those in good standing and who possess the following designations and licenses: CFP®, ChFC, PFS, CFA, Series 65, Series 66.





# AAAA **FIFTY** **UNDER 50**

Each year starting in 2019, AAAA honors Black/African American financial advisors/planner/consultants and industry executives who are distinguished leaders at their firms. These distinguished individuals have advanced the business of providing advice through their leadership, passion, creativity, and willingness to help their clients, communities, and other financial advisors/planner/consultants along the way

Each year, a committee of your peers reviews nominations to create a list of 50 outstanding Financial Advisors, or industry professionals supporting advisors, who are 50 years old or younger. Honorees are judged on their accomplishments, contribution to the industry, leadership, and promise.

It is our honor to highlight the 2022 Class of Fifty Under 50 awardees.







**Joseph Edmonds**  
Regional Sales Specialist  
T. Rowe Price



**Lemar Williams**  
Founder & President  
Traditions Wealth & Legacy Planning



**Allan Boomer**  
Chief Investment Officer  
Momentum Advisors



**Ashton Lawrence**  
Partner  
Goldfinch Wealth Management



**DeAnte Thompkins**  
Senior Market Director  
Thrivent



**Rick Nott**  
Senior Wealth Advisor  
LourdMurray



**Theodore Parrish**  
President & Chief Investment Officer  
Parrish Capital



**Candace Brewington, MBA**  
Financial Advisor  
Thrivent



**Savon C. Gibson Sr**  
Owner / Managing Director  
Gibson Financial Planning



**Dr. Constance Craig-Mason, MRFCA®**  
Master Registered Financial Consultant  
Concierge Financial Group



**Jason Ellis**  
Financial Consultant  
Fidelity Investments



**Ray Henderson**  
President | CEO  
Henderson Financial Group LLC



**Mark C Smith**  
Senior Vice President  
Investments  
Wells Fargo Advisors



**Terrance Dedrick**  
Financial Advisor  
Dedrick Wealth Management Group of Raymond James



**Kamila Elliott**  
CEO & Founder  
Collective Wealth Partners



**Brian O Butler**  
CEPA, CRPC, CPFA  
Wealth Standard Financial



**Rickie Taylor**  
Regional Director  
Retirement Plan Consultants



**Leon Taylor**  
Financial Advisor  
Raymond James and Associates



**Russell Mahan**  
Managing Partner  
Gardens Wealth Management - Wells Fargo Financial Network



**Reggie Turner**  
Financial Advisor  
RBC Wealth Management



**Frederick Coleman**  
Financial Advisor  
RW BAIRD



**Ekenna Anya-Gafu, CFP®**, AAMS®  
Chief Financial Officer & Director of Planning  
Bay Street Capital Holdings



**Meron Yemane**  
Senior Vice President  
Morgan Stanley



**Alleson Tate, CFP®**  
Founder and Principal  
Avere Wealth Management



**Jason Ray**  
Chief Executive Officer  
Zenith Wealth Partners



**Johnathan Shaw**  
Executive Director  
Sub Complex  
Manager  
*Morgan Stanley*



**Jasmine N. Davis**  
Senior Vice President  
Associate Complex  
Manager  
*Morgan Stanley*



**Arthur Blakey**  
Market Director  
-Wealth  
Management  
*JP Morgan*



**Chelsea Ransom-Cooper**  
Managing Partner, Financial  
Planning Director  
*Zenith Wealth Partners*



**Travis O'Quinn**  
Managing Director -  
Asst. Complex Dir.  
(Triad/Triangle NC)  
*Truist*



**Ebony Moore**  
National Training  
Officer, VP  
*Morgan Stanley*



**Tashian Murray**  
VP, Strategic  
Initiatives Lead -  
Practice Strategy  
*Morgan Stanley*



**Samanda Newsom**  
Product Director,  
*Ally Wealth*  
Management  
*Ally Invest*



**Armana Milbry**  
Financial  
Advisor  
*JP Morgan*



**Sterling Lane**  
Market Director  
Wealth  
*Jp Morgan Wealth*  
Management



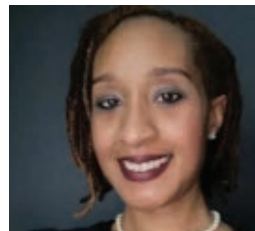
**Georin Lagrant**  
Senior Sales Support  
Manager  
*Citi - U.S. Consumer*  
Wealth Management



**Markell Byrd**  
SVP; Diverse Client  
Segments - Head  
of Affluent Markets  
*Wells Fargo*



**Justin Lacey**  
First Vice President,  
Resident Dir.- Wealth  
Management Advisor  
*Merrill Lynch*



**Dr. Dana Palma, AAMST™**  
AAAA Board Secretary  
Financial Advisor  
*Edward Jones*



**Sharif A. Muhammad, MBA, CPA, MST, CFP®**  
AAAA Financial Secretary  
Founder & Managing Member  
*Unlimited Financial Services, LLC*



**Romy Pickron**  
Chief Executive  
Officer  
*Asset Achievers, LLC*



**Egerton Bullock, CFA, CFP®**  
International  
Client Advisor  
*Morgan Stanley*



**Chloé A. Moore, CFP®**  
Founder & Principal  
*Financial Staples*



**Shane M. Spells**  
Founder  
*ARTAAD*  
*Financial, Inc.*



**Chris Blodgett, AIF®**  
Founder  
*Crescent Capital*  
Planning



**Malcolm Ethridge, CFP®**  
Executive Vice President,  
Financial Advisor  
*CIC Wealth*



**Tiffany Hawkins**  
Chief Operating  
Officer - *Momentum*  
Advisors & Founding  
Partner of *Franklin*  
*Morgan Private Equity*  
Fund



**Keith Beverly, CFA, CFP®, MBA**  
Managing Partner  
and CIO  
*Grid 202 Partners*



**Armand Leaks**  
Vice President,  
Regional Investment  
Consultant  
*T.Rowe Price*



**Eric Seale**  
Regional  
Sales Specialist  
*T. Rowe Price*

# TOP PRODUCER AWARDEES

Top Producer Awards recognize individuals who consistently display top performance and team contribution within their organizations, have remarkable reputations among their colleagues, and have significant social and community profiles.

**The AAAA  
V.I.S.I.O.N.  
Top Producer -  
Bank Brokerage**



**Mark Smith**  
Senior Vice  
President - Investments  
*Wells Fargo Advisors*

**The AAAA  
V.I.S.I.O.N.  
Top Producer -  
Wirehouse**



**Meron Yemane**  
Senior Vice  
President  
*Morgan Stanley*

**The AAAA  
V.I.S.I.O.N.  
Top Producer -  
Independent Advisor**



**Ashton Lawrence**  
Partner  
*Goldfinch Wealth  
Management*

# EXCELLENCE IN **COMMUNITY SERVICE** AWARDEE

The Excellence in Community Service Award identifies and celebrates individuals for their dedication to pro bono service initiatives for the communities where they operate in.



**Reggie Turner**  
Financial Advisor  
*RBC Wealth  
Management*

# 2022 AAAA **SPIRIT OF THE V.I.S.I.O.N. LEADERSHIP AWARD**

The Spirit of the V.I.S.I.O.N. Leadership Award is presented to leaders who embody the vision of the founder of AAAA LeCount Davis in three key areas:

- Dedicated and actively working to increase B/AA representation in the WM industry.
- Dedicated and actively working to increase B/AA representation in the C-Suite.
- Dedicated and actively working to increase access to wealth management opportunities for the B/AA retail community.

**2022 Spirit of the V.I.S.I.O.N.  
Leadership Award Recipient**



**Andy Sieg**  
President  
*Merrill Wealth Management*

# SUMMARY OF AAAA's 2022 V.I.S.I.O.N. CONFERENCE Attendance Data

The AAAA's 2022 V.I.S.I.O.N. Conference was an impactful gathering that brought hundreds of professionals from all over the country to ReConnect, ReEngage, and ReEnergize. Now that the conference is over, here is an overview of the overall objectives of the 2022 V.I.S.I.O.N. conference as follows:



Provide Professional Development Sessions with Continuing Education Credits – **Accomplished.**

Create a networking atmosphere to support recruiting and retention efforts by our partners – **Accomplished.**

Facilitate business development opportunities for attendees – **Accomplished.**

Overall AAAA V.I.S.I.O.N. Conference Registration Count:  
**\*525 Attendees**

Overall Number of Students and Career Changers Present:  
**\*50 Prospects (Representing 4 HBCU's)**

AAAA 2022 V.I.S.I.O.N. Conference – Session and Speaker Demographic Data:

Overall Number of Professional Development Sessions:**61**

% Of Session Eligible to Provide C.E. Credit: **85%**

% Of Attendees with Advanced Certification: **61**

% Of Registered Attendees Per Session Relative to Room Capacity: **57.4%**

Overall Number of Speakers: **104**

% Of Female Speakers: **38%**

% Of Male Speakers: **62%**

AAAA 2022 V.I.S.I.O.N. Conference Attendee Demographic Data:

Overall AAAA V.I.S.I.O.N. Conference Registration Count:  
**525 Attendees**

% Of Attendees Local to State of Georgia: **19%**

% Of Attendees with Series 6 or 7 License: **75%**

% Of Attendees with Advanced Certification (CFP, CRPC, ChFC, CFA, CLU, CIMA): **61%**

% Of Registrants who signed up for Recruiting Event; Dine Around w/Sponsor: **43%**

Breakdown of Registered Attendees' Highest Degree Attained:

Bachelor's Degree: **54%**

Master's Degree: **33%**

Doctorate Degree: **6%**

Professional Certificate: **5%**

Conference Mobile App Engagement:

Overall Number of Attendees who Downloaded the Mobile App: **483**

% Of Conference Attendees Engaged on Mobile App – **60%**

% Of Conference Attendees Who Networked on Mobile App – **43%**

## 2022 V.I.S.I.O.N. Conference Exit Survey Results

Survey Question	Very Satisfied	Somewhat Satisfied	Neither Satisfied nor Dissatisfied	Somewhat Dissatisfied	Very Dissatisfied
1. How satisfied are you with the variety of topics presented at the conference	59.6%	25%	11.5%	1.9%	1.9%
Survey Question	Strongly Agree	Agree	Neither Agree Nor Disagree	Disagree	Strongly Disagree
2. I'm happy with the amount of information presented in each conference session.	42.3%	42.3%	11.5%	1.9%	1.9%
Survey Question	True	False			
3. The conference provided me with actionable information.	88.5%	11.5%			
Survey Question	Yes	No	I don't know		
4. Are you planning to return to next year's annual conference?	82.7%	17.3%	0%		

If you have any questions regarding The Association of African American Financial Advisors (AAAA), please complete the contact form found on the **CONTACT US** tab of our website and a member of our Operations Team will respond within 48 hours.

**WWW.AAAFAINC.COM**



## AAAA MAIN OFFICE



1050 CONNECTICUT AVENUE NW | SUITE 500  
WASHINGTON, DC, 20036  
(202) 572-1019  
INFO@AAAFAINC.ORG

**20 YEARS**  
AAAA  
ASSOCIATION OF AFRICAN AMERICAN  
FINANCIAL ADVISORS  
SHAPING THE FUTURE

