

FOR IMMEDIATE RELEASE

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**CFP BOARD RECOGNIZES OUTSTANDING
FINANCIAL PLANNING ARTICLES FOR 2001**

Denver, Colorado, Oct. 26, 2001 — Certified Financial Planner Board of Standards Inc. today announced the recipients of its 2001 Article Awards in recognition of meritorious financial planning articles published in academic, professional and trade publications from Jan. 1, 2000, through June 30, 2001. Winners of the \$1,000 awards are as follows:

Academic Journal Articles

- Kenneth S. Bigel, CFP(tm), for his article, “The Ethical Orientation of Financial Planners Who Are Engaged in Investment Activities: A Comparison of United States Practitioners Based on Professionalization and Compensation Sources,” published in *Journal of Business Ethics*, December 2000.

Professional/Trade Publications

- David J. Gordon, CFP(tm), for his article, “Are You an ERISA Fiduciary? Are You Sure?,” published in *The Docket*, January 2000.
- Deborah L. Jacobs, for her article, “Not-So-Easy Prey,” published in *Bloomberg Wealth Manager*, April 2001.
- James Lange and Steven T. Kohman for their article, “The Roth’s Real Advantage,” published in *Financial Planning Magazine*, May 2000.
- Hugh D. Pforsich and Mario G. Reyes for their article, “Why Bonds?,” published in *Financial Planning Magazine*, October 2000.
- John J. Scroggin for his article, “’Tis Better to Give,” published in *Financial Planning Magazine*, July 2000.

Consumer Publications

The following series was treated as a single article:

- Cemil (Jim) Otar for “Retirement Planning: Roadmap to Where?,” December 2000; “Equities During the Last 100 Years,” January 2001; and “Volatility, Inflation and Withdrawals,” May 2001; all published in *Canadian Money Saver*.

“This year’s winners stood out in a strong field of entries,” said Kathryn Ioannides, CFP(tm), director, education and examinations for CFP Board. “We were especially delighted for one of the awards to go to a Canadian writer for the first time.”

To read some of this year's award-winning entries, visit the Internet site www.CFP.net/press_awards.html.

CFP(tm) professionals who are members of CFP Board's Board of Examiners judged the entries. Judges make a blind review of submissions and may offer up to 15 awards of \$1,000 per article each year. **The deadline for submitting articles for next year is July 31, 2002.** To be eligible for next year's awards, articles must be published from Jan. 1, 2001 through June 30, 2002. For further information and submission criteria, write to Kathryn Ioannides, director, education and examinations, CFP Board, 1700 Broadway, Suite 2100, Denver, CO 80290, or contact her by email at kioannides@CFP-Board.org or by phone at (303) 830-7500.

Certified Financial Planner Board of Standards Inc., a professional regulatory organization, fosters professional standards in personal financial planning so that the public values, has access to and benefits from competent financial planning. CFP Board owns the certification marks CFP(tm), CERTIFIED FINANCIAL PLANNER(tm) and federally registered CFP (with flame logo). These marks are awarded to individuals who successfully complete CFP Board's initial and ongoing certification requirements. As of Sept. 30, 2001, CFP Board had authorized 38,188 individuals to use these marks in the United States. For more about CFP Board, visit its Web site at www.CFP-Board.org.

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