



Dear Rita,

Thank you for your memorable Ethics CFP Board CE presentation last month at our Financial Planning Association of Austin Chapter! As President-Elect, and a long-time FPA leader, I understand the importance of education to our members' ability serve clients. Simply put, your program and delivery were excellent.

It was quite obvious that you put your heart into building and preparing this program. You were thorough and engaging when covering the required CFP Ethics curriculum and our audience was appreciative of you reviewing the proposed changes to the CFP Board Standards. We were all impressed with your focus on trending topics associated with serving an aging population. Cognitive decline and longevity risk are of issues of primary importance to professional advisors and their clients. The articles, content, and anecdotes you shared were all very well received.

Thank you again for your time and effort to bring us such a comprehensive Ethics Education program. Please feel free to share this reference with other FPA chapters and groups that may benefit from partnering with you and Blue Ocean Global Wealth!

With Sincere Appreciation,

A handwritten signature in black ink, appearing to read 'Shane Sullivan'. The signature is fluid and cursive, with a large initial 'S' and a long, sweeping tail.

Shane Sullivan  
FPA Austin President-elect