

Marguerita M. Cheng, CFP®

Author, Speaker, and Chief Executive Officer



Topics include:

- *Diversity in America*
- *Social Security Optimization*
- *Financial Planning*
- *Entrepreneurship*
- *Advanced Business Retirement*
- *The Intangibles of Success: Soft Skills*
- *Effective Client Communication*

Marguerita M. Cheng is the Chief Executive Officer at Blue Ocean Global Wealth. Prior to co-founding Blue Ocean Global Wealth, she was a Financial Advisor at Ameriprise Financial and an Analyst and Editor at Towa Securities in Tokyo, Japan. Marguerita has been quoted and featured in numerous national publications. Marguerita is a spokesperson and consultant for the AARP Financial Freedom Campaign. She is a CFP® professional, a Retirement Income Certified Professional®, a Chartered Retirement Planning CounselorSM, and a Certified Divorce Financial Analyst. As a Certified Financial Planner Board of Standards (CFP Board) Ambassador, Marguerita helps educate the public, policy makers, and media about the benefits of competent, ethical financial planning. She serves as a subject matter expert for CFP Board, contributing to the development of examination questions for the CFP® Certification Examination. She proudly serves on the FPA National Board of Directors and is a member of its finance committee. Marguerita is the 2013 Chair of the Financial Planning Association of the National Capital Area (FPA NCA). Marguerita is a recipient of the Ameriprise Financial Presidential Award for Quality of Advice and the prestigious Japanese Monbukagakusho Scholarship.

Marguerita's mantra: "So many people spend their health to gain wealth, and then have to spend their wealth to regain their health" (A.J. Reb Materi).

"As founder and president of the Society for Financial Education and Professional Development (SFE&PD), Inc., I have had the distinct pleasure of collaborating with Marguerita for several speaking engagements and the delivery of qualified education programs. I recently asked her to join me for a speaking opportunity at The Asian/Pacific Islander American Chamber of Commerce & Entrepreneurship conference. Her comments and energy were enthusiastically well received."

-Theodore R. Daniels, SFE&PD Founder & President

"Rita Cheng delivered an excellent continuing professional education on Social Security to about 30 accountants at our firm. The information was timely, relevant and added value to our knowledge bank. Rita used real-life examples that our team would encounter to drive home the messages in the presentation. We enjoyed the content and thought Rita was very knowledgeable on the subject area."

-Diane DeCesare, Drucker & Scaccetti Shareholder



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