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MICHAEL E. KITCES, MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL, CWPP™, IS THE DIRECTOR OF FINANCIAL PLANNING FOR PINNACLE ADVISORY GROUP, A PRIVATE WEALTH MANAGEMENT FIRM LOCATED IN COLUMBIA, MARYLAND THAT OVERSEES APPROXIMATELY \$600 MILLION OF CLIENT ASSETS. IN ADDITION, HE IS THE PUBLISHER OF THE E-NEWSLETTER *THE KITCES REPORT* AND THE BLOG *NERD'S EYE VIEW* THROUGH HIS WEBSITE KITCES.COM, DEDICATED TO ADVANCING KNOWLEDGE IN FINANCIAL PLANNING.

Beyond his website, Michael is an active writer and editor across the industry and has been featured in publications including *Financial Planning*, the *Journal of Financial Planning*, *Journal of Retirement Planning*, *Practical Tax Strategies*, and *Leimberg Information Services*, as well as *The Wall Street Journal*, *BusinessWeek*, *CNBC PowerLunch*, *NBC Nightly News*, and more. In addition, Michael is a co-author with John Olsen of “*The Annuity Advisor*”, the first balanced and objective book on annuities written for attorneys, accountants, and financial planners, and is also a co-author of “*Tools & Techniques of Retirement Income Planning*” with Steve Leimberg and others.

Michael was recognized as one of only 5 financial planning practitioner “Movers and Shakers” for 2006 by *Financial Planning* magazine, and was recognized as one of 20 “Rising Stars in Wealth Management” by *Institutional Investor News* for 2007. These awards were presented to honor Michael’s active work in the financial planning community, serving as a member of the Editorial Review Board for the *Journal of Financial Planning*, a Moderator for the discussion boards on *Financial-Planning.com*, a commentator on annuity, retirement distribution, and retirement planning issues for *Leimberg Information Services, Inc.*, and for his work as an active member of the Financial Planning Association at the local and National level. Michael is also a co-founder of NexGen, a community of the next generation of financial planners that aims to ensure the transference of wisdom, tradition, and integrity, from the pioneers of financial planning to the next generation of the profession.