

News | Indices  
**Dow** 10318.16 **-14.28** 4:31pm  
**Nasdaq** 2146.04 **-10.78** 5:30pm  
**S&P 500** 1091.38 **-3.52** 5:01pm

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## Mark E. Amberg, CFP®

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### Associations

- Financial Planning Association
- National Guard Association of the United States
- National Guard Association of the District of Columbia
- Military Officer Association of America
- Reserve Officer Association
- Seichou Karate - Black Belt

### Education and Licensing

- CERTIFIED FINANCIAL PLANNER™ Certification, 2001  
CFP Board of Standards  
Denver, CO
- Series 65 - Investment Advisory Agent, 1995
- Series 7 - General Securities Representative, 1994
- Series 63 - Uniform State Exam, 1994
- Master of Business Administration, 1993  
Florida Institute of Technology  
Melbourne, FL
- Bachelor of Arts, 1991  
St. Leo College  
Valedictorian  
Summa Cum Laude  
St. Leo, FL
- Series 31 - Managed Futures & Commodities, 1998
- Life & Health Insurance Licenses

### Business Experience

- **1995 - Present: Morgan Stanley Smith Barney\***  
Second Vice President - Wealth Management  
Financial Advisor  
CERTIFIED FINANCIAL PLANNER™  
Alexandria, VA
- **1994 - Present: District of Columbia  
Air National Guard**  
Commander  
113 Maintenance Operations Flight  
Andrews AFB, MD
- **1993 - 1995: Information Spectrum, Inc.**  
Analyst - International Space Station Alpha  
Johnson Space Center  
Houston, TX
- **1986 - 1993: U.S. Air Force**  
Various Logistical Roles  
MacDill AFB, FL

### Services

- 529 Plans
- Alternative Investments
- Asset Management
- Cash Management
- Estate Planning
- Financial Planning
- Fixed Income
- Lending Services
- Long Term Care Insurance
- Municipal Bonds
- Philanthropic Services
- Retirement Planning
- Wealth Management
- Professional Portfolio Management
- Education Planning
- Exchange Traded Funds

- Institutional Services
- Corporate Retirement Plans
- 401k Rollovers
- Socially Responsible Investing

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