



HB Shareholder Earns CFP® Certification



Russ Plattner, CPA, PFS and Heinold Banwart, Ltd. shareholder recently passed the CFP® exam and has been authorized by the Certified Financial Planner Board of Standards (CFP Board) to use the CERTIFIED FINANCIAL PLANNER™ and CFP® certification marks in accordance with CFP Board certification and renewal requirements.

As a CERTIFIED FINANCIAL PLANNER™ professional, Russ will be uniquely qualified to aid clients in the financial planning process, risk management, investments, tax planning and management, retirement and employee benefits, and estate planning.



CERTIFIED FINANCIAL PLANNER™

Russ became a shareholder of Heinold Banwart, Ltd. in 1984. He holds a bachelor's degree in accounting from Illinois State University as well as Certified Public Accountant and Personal Financial Specialist credentials.

The CFP® marks identify those individuals who have met the rigorous experience and ethical requirements of the CFP Board, have successfully completed financial planning coursework, and have passed the CFP® Certification Examination covering the following areas: the financial planning process, risk management, investments, tax planning and management, retirement and employee benefits, and estate planning. CFP® professionals also agree to meet ongoing continuing education requirements and to uphold CFP Board's Code of Ethics and Professional Responsibility, Rules of Conduct and Financial Planning Practice Standards.

CFP Board is a nonprofit certification organization with a mission to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for personal financial planning. CFP Board owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with plaque design) and CFP (with flame design) in the U.S., which it awards to individuals who successfully complete initial and ongoing certification requirements. CFP Board currently authorizes more than 80,000 individuals to use these marks in the United States. For more about CFP Board, visit www.CFP.net.

Located in East Peoria, Illinois, Heinold Banwart, Ltd. provides expert accounting, tax, consulting, and audit and assurance solutions to businesses and individuals alike. Its comprehensive services range from traditional advisory to specialty, including payroll and employee benefit plan administration, business valuation, forensic investigation and litigation support, and succession planning. The Firm values building lasting client relationships and adhering to the highest industry and professional standards. Learn more at www.hbcpas.com.