

Professional Designations: A PC's Opinion
by Tim Halls

Few things are more important in being a *Moneta Group Family CFO* than possessing broad professional expertise. This is why professional designations are of such great importance at Moneta Group. Someone who has embraced this concept fully is Patrick McGinnis, professional consultant on the Kukla Team. We asked him to share his thoughts on the subject.

“Obtaining these designations is not without sacrifice of free time away from Moneta,” McGinnis says. “My wife wants to punch me for the number of times she hears, ‘I have to study’ in the months leading up to a test. I've turned down Cardinals tickets (unheard of for me), I've studied on weekend nights, and gotten up early many mornings. But in the end, it's absolutely worth it....plus she's not that strong,” he quips.

“In order to provide the best possible service to our clients,” he continues, “we need to be experts in our field. This entails developing a wide knowledge base and constantly improving it. By obtaining the CFP designation, and now working towards the CFA designation, I am building an expertise that I'm able to put into practice in order to better serve our clients.”

The level of commitment demonstrated by people across the firm to increase their professional expertise is truly amazing. Below we list every associate at Moneta who has a professional designation, and ask you to applaud yourselves and your co-workers for the sacrifices made in the interest of better serving our clients!

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