



STATEMENT OF QUALIFICATIONS
FOR
Bill Duggins, CFP®, CPA

Professional Designations:

CPA - Certified Public Accountant
State of California

CFP® - Certified Financial Planner

Licenses:

Securities Registrations: Series 24 (General Securities Principal)
Series 7 (General Securities Representative)
Series 63 (Uniform Securities Agent State Exam)
Series 65 (Uniform Investment Advisor)

Insurance License: State of California Insurance License #0B00889

Real Estate Broker:
License State of California

Education: UCLA Class of 1977- B.A. in Economics
(Cum Laude)

Experience: 26 years of experience in Investment
Management and Retirement Plan Consulting