

ASSET MANAGEMENT GROUP INC.

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FOR IMMEDIATE RELEASE

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LeGrand S. Redfield, Jr. CLU, ChFC is Granted CFP® Mark

Asset Management Group, Inc. of Stamford, CT., is pleased to announce that the Certified Financial Planner Board of Standards, Inc. has granted the Board's certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, with all rights and privileges pertaining thereto to LeGrand S. Redfield, Jr. CLU, ChFC.

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances.
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year).
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field.
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interest of their clients.

Asset Management Group, Inc. recognizes the importance of continuing education for each of our team members, and we support them to expand their knowledge in all areas of the financial planning process. As the world of finance becomes ever more complex, we need professionals who can understand and communicate about all aspects of the financial planning process. Mr. Redfield founded Asset Management Group, Inc. in 1983. The financial planning practice is a dynamic, privately held company with a well-established customer base. The firm builds long-term relationships with clients and provides them with financial planning advice and counseling. The company is proactive in bringing information and advice to its clients and strives to provide services that exceed their client's expectations.

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