Lassus Wherley

Building Better Futures

CERTIFIED FINANCIAL PLANNER™

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FOR IMMEDIATE RELEASE

Patricia Daquila Completes CERTIFIED FINANCIAL PLANNER™ Certification Requirements

New Providence, NJ (September, 2017) – Patricia Daquila, MBA, CPA, CFP® and Senior Tax Advisor at Lassus Wherley 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. Pat joined Lassus Wherley in 1997. As a Certified Public Accountant Pat focuses on the preparation of tax returns for individuals, and estates and trusts. Our firm encourages credentials such as CERTIFIED FINANCIAL PLANNER™ to enhance our advisors' ability to meet the increasingly complex and broad-based needs of our clients.

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 76,000 individuals to use these marks in the United States. For more about CFP Board, visit www.CFP.net.

ABOUT LASSUS WHERLEY

Lassus Wherley was founded in 1985 by Diahann W. Lassus, CFP®, CPA/PFS and Clare E. Wherley, CPA, CFP®. We have two offices to serve our clients, one in New Providence, NJ, and the other in Bonita Springs, FL. Lassus Wherley is a Fee-Only wealth management firm with expertise in financial planning, investment management, tax preparation, trust services, and family office support. We work with individuals, couples, families, pension and profit sharing plans, trusts, estates, and charitable organizations. Using a team approach that we have developed over more than 30 years, we have helped hundreds of clients build secure financial futures and achieve peace of mind. Lassus Wherley is a nationally certified Women's Business Enterprise by the Women's Business Enterprise National Council (WBENC) and a member of the National Association of Personal Financial Advisors (NAPFA), the nation's leading organization dedicated to the advancement of Fee-Only comprehensive financial planning. The Lassus Wherley web site is www.lassuswherley.com.