

WADDELL GROUP

AN INDEPENDENT FIRM

Individual Solutions from Independent Advisors

Just like with a physician or an attorney, your relationship with your financial advisor is a delicate one, based on professionalism and trust. We value the trust that our clients place in our abilities.

What makes us different? We're independent – and that means objective – when helping you select the appropriate investment and insurance solutions for your needs.



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1960 Gallows Road, Suite 110 | Vienna, VA 22182
703-881-9173 | Fax: 703-881-9174
christopher.waddell@raymondjames.com
theresa.waddell@raymondjames.com
waddellgroup.net



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a person with special NEEDS...

a family with special CHALLENGES...

an advisor with special SKILLS.™



As advisors, we often work with our clients and their extended families and other professional advisors. Our multigenerational focus and in-depth understanding of our clients' values allow us to bring holistic and creative solutions to our clients.

As parents of three children – two of whom have special needs – we make it a point to reach out to other families who are living a life like ours.

About Us

Christopher Waddell, a CERTIFIED FINANCIAL PLANNER™ professional, has dedicated his career to building solid, long-term relationships and to providing his clients with exceptional financial guidance for nearly two decades.

Many of his clients are multigenerational families, with complex investment, risk management and estate planning issues. He also helps employers provide group retirement and insurance plans. Christopher was named in the Consumer Research Council of America's *2006 Guide to America's Best Financial Planners*. In 2005, Christopher completed the 30th Marine Corps Marathon to raise funds for autism research. He is president of the Autism Society of America Northern Virginia Chapter.

Theresa Waddell, a Certified Public AccountantSM and Chartered Mutual Fund CounselorSM, is well-versed in helping families with complex tax and estate planning issues. She also works with medical and legal practices, family-owned businesses and executives. Prior to becoming a financial advisor in 2000, Theresa was an auditor for two international not-for-profit organizations and a "Big Eight" public accounting firm. For 2007-08, Theresa is president-elect of the Northern Chapter Virginia Society of CPAs. Since 2005, she has been voted annually by her peers as a "Super CPA" in estate planning and trusts in the *Virginia Business Magazine*.

Christopher and Theresa both graduated from Georgetown University; they are adjunct faculty members of the Georgetown University's School of Continuing Studies. The family was featured on ABC World News Tonight in February 2007.

The Special Needs Planning Process

As parents and financial advisors, we have a unique commitment to helping other families with special needs achieve financial security.

Planning for the long-term financial needs of a loved one can be complex and overwhelming. Recognizing that a customized financial plan can help provide our loved ones with as much autonomy as possible – we help our clients not only create an appropriate strategy, but also implement that strategy.

Look to us for institutional and private wealth creation and management, along with trust management services including special needs trust advisory services.

We also enjoy speaking and writing about special needs financial planning. Our articles have appeared in medical and not-for-profit journals. Our speaking engagements include disability conferences – including the Accessibility Summit at McLean Bible Church in McLean, Virginia, – and public and private workshops for families and professionals.