

Ken Gillaspie Legacy Fund 2020 Scholarship Recipients

Congratulations to Rosanna Marie Neil & David Tenerelli !!



We are excited to announce this year's recipients of the Ken Gillaspie Legacy Fund Scholarships: Rosanna Marie Neil and David Tenerelli. Both will be participating in Money Quotient's "Fundamentals of Truth Wealth™ Planning" virtual training course that will be conducted September 14-18, 2020.

The selection committee is comprised of members of the MQ Advisory Board who review the applications and award one scholarship in each of the following categories:

Early Career - Student and/or New Planner (including career changers)

Established Career - Influencer/Educator and/or Unique Focus of practice or outreach activities

Rosanna Marie Neil was selected as a scholarship recipient in the Early Career category. She is an attorney with a decade of experience in areas ranging from civil rights and commercial litigation to environmental advocacy. She is currently enrolled in Boston University's Capstone Course in Financial Planning as part of the Accelerated Path to CFP certification.

David Tenerelli was selected as a scholarship recipient in the Established Career category. He has an MS in Financial Planning and is affiliated with Strategic Financial Planning, Inc. in Plano, TX. He began his career as a music educator and then transitioned to financial planning in 2017. Earlier this year, his research article

"Scaffolding or Enabling: Implications of Extended Parental Financial Support" was published in the *Journal of Financial Therapy*.

When Rosanna was asked how she plans to apply the MQ training, she replied:

As a Black woman, I'm particularly interested in serving the Black community because there's so much potential to empower people who haven't been taught how to manage cash flow and navigate the financial system. There is also a tremendous need to close the wealth gap between White and Black American families. This financial bondage is a challenge that we have to tackle both at the systemic level and there personal level.

When David was asked to describe his philosophy and approach to financial planning, he wrote:

...it is my belief that the lynchpin of truly effective financial planning is the client-planner relationship and the process of client self-discovery that can result from that relationship.

The client-planner relationship takes shape organically as the life planning process unfolds. By helping our clients develop personal psychological insight, they can better understand their values and can align their goals to those values. When the planner is able to facilitate this process effectively, he or she is able to be more present and provide recommendations that better align with the client's values-based goals.