

William L. Raddatz M.S., CFP®

CFP Board Registered Instructor

Education

- BA degree: Information Systems Eckerd College, St. Petersburg, FL
- Master of Science - Financial Analysis – January 2007
College for Financial Planning, Denver, CO
- CFP® curriculum College for Financial Planning, Denver, CO – 1997

Designations

- CERTIFIED FINANCIAL PLANNER™ professional since January 1998

Industry Involvement

- Financial Planning Instruction Corporation (October 2005 to present)
 - President & Instructor
 - Taught all six modules of the CFP Board registered educational curriculum and CFP® Live Reviews (using Zahn material - registered through Tallahassee Community College, FL)
 - Teaching all six modules of the Taught all six modules of the CFP Board registered educational curriculum and CFP® Live Reviews (using self-authored material - registered with CFP Board through Taylor University, IN)
- Taylor University, Indiana (May 2009 to present)
 - Instructor of Income Tax and Estate Planning online accredited classes
- ProVise Management Group LLC (1993 to 2008)
 - Vice President of Financial Planning and Lead Plan Writer (2000 through August 2003)
 - NASD (FINRA) Registrations Series 7, 24, 62, 63, 65
- Ken Zahn, Inc. (August 2003 to December 2005)
 - Instructor: Taught all six modules of the CFP Board registered educational curriculum and CFP® Live Reviews
 - Wrote and edited educational material for Ken Zahn, Inc.
- President of Financial Planning Association – Tampa Bay Chapter (largest of nine chapters in Florida) 2005
- Chairperson of Financial Planning Association – Tampa Bay Chapter 2006

- Board of Directors of Financial Planning Association – Tampa Bay Chapter 2003-2004
- Task force member Financial Planning Association National Retreat (Houston, TX) 2000
- Task force member Financial Planning Association National Retreat (Innisbrook, FL) 2005
- Task force member Financial Planning Association National Retreat (Phoenix, AZ) 2006
- Program Directors Task force member CFP® Financial Planning Association National Conference (Nashville) 2006
- Task force member FPA National Government Relations SRO/Regulatory Committee 2005 & 2006
- Presenter for National Association of Tax Professionals: Escape Program on Estate Planning 2002
- Presenter for National Association of Tax Professionals: Escape Program on Retirement Plans and Planning Options 2003
- Presenter for Florida Institute of Certified Public Accountants (FICPA) on Financial Planning 2004
- Presenter of numerous CE classes for various industry groups
- A featured speaker around the country; have been quoted and featured in numerous publications including USA Today, Bloomberg Wealth Manager, Chicago Sun Times, and the Tampa Tribune. Also appeared on numerous radio and TV interviews on various financial planning topics.
- Served as Expert Witness in Court on investment case

Publications

- Author of “Retirement Plans 2003: A Planner’s Perspective” published by National Association of Tax Professionals