

Richard J. Busillo, CFP[®], AIF[®], RPA
CHIEF EXECUTIVE OFFICER / SENIOR PLANNER



Richard J. Busillo is Chief Executive Officer of RTD Financial Advisors, Inc. Mr. Busillo joined RTD in 1986 and provides financial planning and investment advisory services to business owners, professionals and retirement plan sponsors. Prior to joining RTD, he was a Regional Manager with CPI Pension Services, Inc., a national pension consulting firm.

A CERTIFIED FINANCIAL PLANNER[™] practitioner, Mr. Busillo is a graduate of Thomas Edison State College and the College for Financial Planning. He has also earned the ACCREDITED INVESTMENT FIDUCIARY[®] designation awarded by the Center for Fiduciary Studies and the RETIREMENT PLANS ASSOCIATE designation awarded by the International Foundation of Employee Benefit Plans and the Wharton School of the University of Pennsylvania.

Mr. Busillo is a member of the Financial Planning Association (FPA), the National Association of Personal Financial Advisors (NAPFA) and the American Society of Pension Professionals & Actuaries (ASPPA) Benefits Council of Greater Philadelphia.

Mr. Busillo is past president of the FPA's Philadelphia Area Chapter and has chaired FPA's National Chapter Advisory Council and National Conference Committee. He has served on the Board of Directors for the March of Dimes Southern New Jersey Division, the Business Advisory Board for Mainstage Center for the Arts and FPA's Pro Bono Committee.

Mr. Busillo serves as an Adjunct Faculty Instructor with The College for Financial Planning; teaching the Retirement Plan and Employee Benefits course. He also serves as a Mentor with the Financial Planning Association's CFP[®] Residency Program. Mr. Busillo has been named one of the Top Ten Wealth Advisors in the Philadelphia Business Journal and Philadelphia Magazine. He has been quoted in several publications, including The Philadelphia Inquirer, The Chicago Tribune, Senior Market Advisor and CNNMoney. He has also appeared on CN8's financial news show Money Matters and NBC Nightly News with Brian Williams.

Mr. Busillo resides in the Philadelphia area and is married with two children. He is an avid runner, cyclist, and martial artist. Mr. Busillo is honored to have achieved his Black Belt in Tang Soo Do Karate and completed the Boston Marathon.

Jeff A. Weiand, CFP[®], AIF[®]
PRESIDENT / COO / SENIOR PLANNER



Jeff Weiand is President, Chief Operating and Compliance Officer of RTD Financial Advisors. Jeff joined the firm in 1985 and became a senior shareholder in 1995. He is a CERTIFIED FINANCIAL PLANNER[™] practitioner which he earned in 1989. Jeff also earned the ACCREDITED INVESTMENT FIDUCIARY[™] professional designation, awarded by the Center for Fiduciary Studies, which is associated with the University of Pittsburgh. A graduate of Rutgers College in New Brunswick, NJ, he earned his Bachelor of Arts degree in Economics with a concentration in Finance.

Jeff chairs RTD's Investment Policy Committee, whose responsibilities include establishing investment policy and determining the appropriate investment vehicles to be utilized. His focus also includes on-going research, portfolio and investment monitoring and developing effective client communication tools and services. He is also a member of the firm's Financial Planning Committee.

Jeff has been named one of the Top Ten Wealth Advisors and Independent Registered Investment Advisors by the *Philadelphia Business Journal* using data compiled by independent financial industry researcher R.J. Shook. He is a member of the Financial Planning Association (FPA). He has served on the FPA's Investment Policy Committee, TD Ameritrade's National Advisory Panel, the Family Resource Management Statewide Advisory Council for the state of New Jersey and has been active with Philadelphia Futures mentoring high school students with college ambitions. He has appeared as a guest on CN8's financial news show *Money Matters* and has been quoted in publications such as the *New York Times* and the *Philadelphia Business Journal*.

A resident of center city Philadelphia, Jeff enjoys walking to the office whenever possible. He is passionate about sports, working out, skiing, the Jersey shore and frequenting some of the great restaurants/BYOB's this city has to offer. He is a true believer that investing has a purpose that goes far beyond asset allocation, diversification and managing risk. Investing in your life and pursuing your dreams with confidence offers the greatest return one can achieve.

Beth Davies, CPC, ERPA

VICE PRESIDENT OF RETIREMENT PLAN SERVICES



Beth Davies is Vice President of Retirement Plan Services at RTD Financial Advisors, Inc. She works directly with business owners and executive staff to develop and monitor highly effective retirement programs for their organizations. Beth offers resourceful solutions to each client's unique needs. She has earned the trust and confidence of clients and their other advisors with her depth of knowledge and perspective.

A pension practitioner since 1981, Beth was a shareholder at Stephen H. Rosen & Associates, Inc. When the firm was rebranded under United Retirement Plan Consultants, Inc. she served as Vice President of Retirement Plan Consulting. She was also Vice President of the former Pension Consulting Services, Inc. Beth has enjoyed mutual client relationships with RTD Financial Advisors, Inc. since its inception and was delighted to join the firm in October 2013.

Beth has earned the Certified Pension Consultant designation from the American Society of Pension Professionals and Actuaries and the Enrolled Retirement Plan Agent designation from the Internal Revenue Service. She was also awarded the Accredited Pension Administrator certification from the National Institute of Pension Administrators. Beth was a faculty member of the former Institute of Employee Benefits in Philadelphia and has mentored many pension professionals in the vicinity. She has a Bachelor's Degree in Accounting from Clarkson University in Potsdam, NY.

Active in the community, Beth has served on various committees in her church, local schools and with the Girl Scouts of Central and Southern New Jersey. She resides in Burlington County, NJ and enjoys time with family and friends at her home on Swinging Bridge Reservoir in the Catskills. Married with two children and two Labrador retrievers, she enjoys boating, travel, and cultural events and is an avid reader.