

Mary Kay Voss

CRD #71006

Guardian Plus, Inc.

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This brochure supplement provides information about Mary Kay Voss that supplements the Guardian Plus, Inc. brochure. You should have received a copy of that brochure. Please contact William H McElroy if you did not receive the Guardian Plus, Inc. brochure or if you have any questions about the contents of this supplement.

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Educational Background and Business Experience

Mary Kay Voss, CFP (Certified Financial Planner), EA (Enrolled Agent)
Owner, Mary Kay Voss, 1988- Present

“The Certified Financial Planner” (CFP) designation is a professional certification mark for financial planners conferred by the Certified Financial Planner Board of Standards, Inc. (CFP Board) in the United States.

To receive authorization to use the designation, the candidate must meet education, examination, experience and ethics requirements, and pay an ongoing certification fee. The information relates specifically to CFP certification in the United States.

Education requirements to earn the CFP designation, candidates must meet several requirements—the first of which is the educational requirement, which requires candidates to have a bachelor's degree or higher from an accredited U.S. college or university. As a first step to the present CFP certification criteria, students must master a list of nearly 100 topics on integrated financial planning. The topics cover major planning areas such as:

- General Principles of Finance and Financial Planning
- Insurance Planning
- Employee Benefits Planning
- Investment and Securities Planning
- State and Federal Income Tax Planning
- Estate Tax, Gift Tax, and Transfer Tax Planning
- Asset Protection Planning
- Retirement Planning
- Estate Planning

To fulfill the education requirement, students are required to complete course training in the above listed topic areas in order to meet the first requirement to sit for the 10 hour CFP Board Certification Examination. A bachelor's degree (or higher), or its equivalent in any discipline, from an accredited college or university is required to attain CFP certification.

"Enrolled Agent" (EA) is a tax professional who has passed an IRS test covering all aspects of taxation, plus passed an IRS background check. Enrolled Agents have passed a two-day, 8-hour examination. The examination (called the Special Enrollment Examination) covers all aspects of federal tax law, including the taxation of individuals, corporations, partnerships, and various regulations governing IRS collections and audit procedures. Like CPAs and tax attorneys, EAs can handle any type of tax matter and represent their client's interests before the IRS. Unlike CPAs and tax attorneys, Enrolled

Agents are tested directly by the IRS, and enrolled agents focus exclusively on tax accounting. The "EA" designation may be revoked by the IRS' Office of Professional Responsibility for malpractice.

EF Hutton, Bellevue WA 1984 – 1988
Stockbroker

Smith Barney, Harris Upham & Co. 1980 - 1984
Stockbroker

Disciplinary Information

None

Other Business Activities

Mary Kay Voss, President of Pavement Engineers, Inc, Mill Creek, WA

Associate of Agreement Dynamics, Inc.

Talent represented by Tiffany Talent, Seattle WA

Previous City Council Member, City of Mill Creek, WA 2002- 2009

Guardian Plus provides “fee-only” financial planning. Guardian Plus does not receive any compensations from a brokerage firm, a mutual fund company, an insurance company, or from any other source other than the fees received.

Mary Kay Voss responsibilities at Guardian Plus are limited to her role and duties as Director Financial Planning and are compensated when a client of Guardian Plus wishes to engage Guardian Plus for its financial planning services. When not engaged by Guardian Plus, Mary Kay Voss spends the majority of her time with her other business activities.

Mary Kay Voss’ various listed business activities are not involved in portfolio management and are not related to the financial industry thus there is no conflict of interest.

Additional Compensation

Mary Kay Voss receives compensation from Mary Kay Voss, Agreement Dynamics and Tiffany Talent.

Supervision

All supervision requirements are conducted by William H McElroy