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Donald W. Angel - CERTIFIED FINANCIAL PLANNER™ AND ACCREDITED INVESTMENT FIDUCIARY™

Donald W. Angel, CFP®, AIF® is an LPL-registered representative with Cottrill, Arbutina Wealth Management Group, LLC. He is member of a team that manages investments for clients who are residents of 20 states.

Mr. Angel is a registered representative with, and offers securities through LPL Financial, member FINRA/SIPC. LPL Financial is an independent financial services firm which offers the actual securities and advisory services once clients have made decisions about their accounts.

In his practice, Mr. Angel advises clients on financial needs analysis such as retirement or education planning as well as life, long term care or disability issues, and qualified retirement plan considerations. He also assists the firm's team with portfolio analysis, investment product due diligence and portfolio construction.

He holds designations as a CERTIFIED FINANCIAL PLANNER™ by the Certified Financial Planner Board of Standards, Inc. and as an Accredited Investment Fiduciary™ by the Center for Fiduciary Studies. CFPBS grants the CFP® mark to individuals who successfully complete requirements as a recognized standard of excellence. CFS provides education, investment analytics and resources for fiduciaries, and its AIF® has been named one of the "10 Most Wanted" designations in the industry by *Financial Planning* magazine. He is the author of "Long-Term Care Insurance Checklist," published in the *Western Pennsylvania Guide to Good Health*.

Previously, Mr. Angel was a financial advisor and investment specialist with the Penn Mutual Life Insurance Company in Pittsburgh. While there, he implemented advanced financial planning concepts for clients, and motivated and directed other insurance agents with their clients' investment planning. Earlier, he served as a financial advisor for the Pittsburgh office of American Express Financial Advisors.

Active in the community, Mr. Angel is president-elect of the Rotary Club of McMurray, where he helps raise funds for both local and worldwide philanthropic organizations. He also has volunteered with Career Literacy for African American Youth (CLAAY), a program of Duquesne University's Institute for Economic Transformation that involves one-on-one career mentoring, academic tutoring, and programming.

Mr. Angel received his bachelor's degree in finance in 2000 from the Smeal College of Business at the Pennsylvania State University. As an undergraduate, he served in an internship with Rosewood Capital Partners in Pittsburgh, where he developed hands-on experience with corporate finance, estate planning, investments, portfolio management, merger and acquisition projects and investment banking finance.

He resides in Peters Township with his wife and two children.