## The Arc. of Frederick County

## **Financial and Advocacy Services**

The following organizations have expressed interest in being included in a resource list for individuals and families. This list includes financial planners, specific departments of banks, investment specialists, and advocates. They are all knowledgeable in the areas of meeting lifelong financial needs of an individual with a disability. This is not intended to be a complete list of those who practice in this area. The Arc of Frederick County does not endorse anyone whose name appears on this list.

## **Financial Services**

Fax: 301-662-6139

Ashley D. Goldsborough, DTFA Wealth Advisor First United Bank and Trust 1990 Monocacy Blvd Frederick, MD 21701 Office: 301-662-3770 Toll Free: 800-536-4225

Josie Hoffman, CFP. CRPC. ChSNC Senior Financial Advisor Merrill Lynch 30 West Patrick Street, 4th Floor Frederick, Maryland 21701 301.698.4732 www.fa.ml.com/josie\_hoffman

Kristen Howes, CTFA
Vice President / Personal Trust Specialist
BB&T Wealth
7200 Bank Court
Frederick, Maryland 21703
301.664.6460

Eric Jorgensen, CFP, ChFEBC Turning Point Financial 7210 Corporate Court, Suite A Frederick, Maryland 21703 301.846.9336 eric@tpfinancial.com Monty Knittle and Jim Curran The Curran/Knittle Group 2230 West Joppa Road, Suite 160 Timonium, Maryland 21093 410.659.8919

Troy Linton
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First United Bank and Trust
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Sandra Miller
Family Heritage Trust
30 West Patrick Street, Suite 100
Frederick, Maryland 21701
301-631-5900
smiller@fhtrust.com

## **Advocacy Services**

By Their Side
Lifelong Advocates for Marylanders
with Developmental Disabilities
Kathy Vecchioni
Executive Director
7215 York Road, Suite 352
Baltimore, Maryland 21212
443.279.1234
www.bytheirside.org

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