McPherson Financial Partners, LLC

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Gary Lewis McPherson, II, AIF®, CLTC®, CPFA®

Sr. Managing Partner

McPherson Financial Partners, LLC (MFP)

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Gary McPherson is the Sr. Managing Partner of McPherson Financial Partners, formerly MBWA. Gary has been in the financial services industry for over 15 years.

Prior to his financial services experience, Gary spent several years working with professional athletes at a Washington, DC sports agency. His experience in this area has enriched his ability to provide financial services to athletes.

Gary's financial services career began at an alternative investment group, as the Asst. Fund Administrator, managing public and private funds. He briefly worked at Pen Fed Credit Union, through CUSO Financial Services, where he assisted a financial advisor to educate and help military and former military members with their financial security. In 2008, he became FINRA registered and continued his career by partnering with a veteran financial advisor of a large insurance organization. Gary focused on financial planning, investments, and retirement income planning for individual clients at various net worth and income levels. He also worked directly on retirement plans from $0 assets to $30M in assets, in the for-profit and non-profit sectors.

Gary is an independent financial advisor. He works with business owners, individuals, and professional athletes. As the Sr. managing partner of McPherson Financial Partners (MFP), he is focused on creating customized retirement plan options for businesses and financial plans for individuals. Gary specializes in comprehensive financial planning, investment management and business planning. He creates retirement income strategies to overcome the financial challenges in retirement. He designs customized retirement plans for businesses.

Gary and his wife, Amy, lives with their two children, in Gaithersburg, Maryland. They are actively involved in Montgomery County and the Jewish Community. Also, Gary is involved in teaching financial literacy for non-profit organizations to youth and young adults.

SECURITIES REGISTRATIONS (maintained through Cambridge Investment Research)
FINRA Series 6, 7, 63, and 65.

LICENSES
Life and Health Insurance licenses.

AWARDS and PROFESSIONAL ACTIVITIES
Board Member, Seneca Academy, July 2018
Certified Plan Fiduciary Advisor (CPFA®) from NAPA, Retirement Plan Academy, June 2018
Co-Author, "Remarkable Retirement, Volume 2." p.117-132, Amazon, June 2018
Featured Interviewee, "It's Not Your Parent's Retirement.", Impact Maker's Radio with Stewart Alexander, May 2018
Volunteer, Financial Literacy Trainer, "JA Economics For Success", Junior Achievement, Feb. 2018
Volunteer, Financial Literacy Trainer, Teaching Financial planning to Student Athletes and Pro Athlete Alumni of Watkins Award, Feb. 2014 - Present
Accredited Investment Fiduciary (AIF®) from Center for Fiduciary Studies, February 2016
Certified in Long Term Care (CLTC) from the CLTC Board of Standards, Inc., April 2010

EDUCATION
Bachelor of Science degree, Towson University, Business Management major and financial planning minor.
Bachelor of Science degree, University of Pittsburgh, Psychology major.