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Aug. 29, 2006

Education – MBA, Texas Woman's University; BS, Univ. Central Arkansas

Hobbies & Interests – Golfing, entertaining friends and family, reading, and singing at weddings and special events.

Professional Affiliations – Financial Planning Association, Society of Certified Senior Advisors.

What peers, clients and friends say about Dawn:

Dawn is able to quickly connect with a lot of different types of people; to her, everyone's a friend. If she were a baseball player, she would be the utility infielder, noted one friend, because she can play many different positions and thrive at every one of them. She's constantly working on a million projects at one time. Of course, she has the messiest desk on the planet, can break into song at any moment, and is extremely competitive when it comes to board games at parties.

What technology or business process does Dawn see affecting the tax and accounting profession in the next five years?

"With more than 76 million baby boomers entering retirement, clients will continue to look for 'one-stop wealth management' from someone they trust. CPAs and tax professionals, with their intimate understanding of the client's finances and extensive financial knowledge, are uniquely positioned to help these clients determine a financial course to help them pursue their goals. The challenge then becomes one of business management. How do you run this type of business profitably and efficiently? The technology, support, training and practice management systems that companies like H.D. Vest provide make

offering

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