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ACCOUNTING & AUDIT

Cromwell Baun, CPA, PFS, CFA, CFP, CIMA – 2017 40 Under 40 Honoree

Aug. 17, 2017



Cromwell Baun, CPA, PFS, CFA, CFP, CIMA

Age: 39

Employer: UBS Financial Services Inc.

Title: First Vice President – Wealth Management

City/State: Atlanta, GA

Website: <http://financialservicesinc.ubs.com/team/thestephensonbaunwmg/>

Twitter:

Professional Associations/Memberships:

The Georgia Society of CPAs

- Member, Leadership Council
- President, Atlanta Chapter
- Member, Estate and Financial Planning Advisory Council
- Chair, Financial Literacy Task Force
- Member, Diversity and Inclusion Task Force
- GSCPA Representative, AICPA Leadership Council

Financial Planning Association of Georgia

- Board Member
- Chair, Partnerships

CFA Institute

- Member

Investment Management Consultants Association (IMCA)

- Member

Over the last 14 years, I have led a successful financial planning and wealth management team, helping families achieve financial peace of mind. I have been recognized in Atlanta Magazine as a 5 Star Wealth Manager, and my team has been previously selected to the National Association of Board Certified Advisory Practices list of Premier Advisors. I am proud to have earned some of the most prestigious designations in the financial services industry, including: Certified Public Accountant, Certified Financial Planner, Certified Investment Management Analyst, and Chartered Financial Analyst. As a young advisor, I was quite honored to be recognized internally by my firm as one of the southeast region's Top 40 Under 40. I was also honored to be a recipient of the AICPA's Standing Ovation Award in 2016 as well as named to the Atlanta Business Chronicle's list of 40 Under 40 in 2016.

I continue to support the accounting profession by volunteering my time to the Georgia Society of CPAs. I hold a number of leadership roles within the Society, helping create meaningful programming for our members and advocating for the profession. I support The Leukemia & Lymphoma Society, holding leadership roles and fundraising to help the fight against blood cancer. I also serve on the board of trustees of The Ron Clark Academy. With the help of numerous business leaders, we have been able to fund three \$18,000 scholarships for three of their 5th graders.

Favorite influencer(s) (authors, bloggers, mentors, speakers, etc.)

My parents have been my biggest influencers. They instilled in me the values of integrity and honesty. They always reminded me to be humble and kind. Values and actions that go a long way in life.

[Read about the other 40 Under 40 Honorees for 2017.](#)

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