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

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### **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

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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 5<sup>th</sup> 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.

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

Accounting

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