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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

previously selected to the National Association of Board Certified Advisory Practices

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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 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.](#)

Accounting

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