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**Jeff Wilson II, CPA/PFS, CGMA, CFE, CDFA – 2020 40 Under 40 Honoree**

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subject matter of personal finance and investments.

- In 2008, becoming a CPA and recognizing the importance of the education and professional advocacy, and became a member of the American Institute of Certified Public Accountants (AICPA) and Maryland Association of Certified Public Accountants (MACPA).
- In 2013, becoming a graduate of the AICPA Leadership Academy.
- Published book on financial literacy in April 2014: *The Lies our Parents Were Sold and Told Us: The New Rules Of Money Management*.

### **What are you doing to make a difference in the profession, your community, the world?**

As a minority in the profession, I believe I have a responsibility to assist others become the best they can possibly be both inside and outside of the profession. I believe exposure and inclusion can only help move the profession. Each year, outside my firm I sponsor and support personally 3-4 individual to help them financially or technically pass the CPA exam. I do this organically and help minority groups that are typically underrepresented in the profession. As a community representative, I think people can that are as financial literate as myself have a responsibility to help those who are not. As a result, I donate my time to financial literacy programs to educate individual and future business owners.

### **Favorite books/websites/podcasts/speakers:**

- Favorite book: *Poor Charlie's Almanack: The Wit and Wisdom of Charles T. Munger*
- Favorite Podcast : *Where Accountants Go*
- Influencer: Charlie Munger (Warren Buffett Partner)

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