The Lubitz Financial Group

PERSONAL FINANCIAL PLANNING & INVESTMENT MANAGEMENT

Linda Lubitz Boone, CFP®

President & Founder

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Linda Lubitz Boone, CFP**®** is the President and Founder of The Lubitz Financial Group. She provides Personal Financial Planning and Investment Management for individuals and Pension Plan trustees on a fee for service basis. The firm is a fiduciary for their clients. Linda has over 30 years experience in financial services. She holds a B.A. in Economics and is a Certified Financial Planner™ practitioner and a Certified Divorce Planner. She is the co-author of the book, Investment Policy Statements – Guidelines and Templates, published by The Financial Planning Association. Linda is quoted frequently in the press, including The Wall Street Journal, CBS MarketWatch, FORTUNE, Kiplinger's Personal Finance Magazine, Newsweek, The Miami Herald and WIOD. Linda has exceptional skills in working with clients who are undergoing life transitions such as death of a spouse, planning a post professional life, divorce, sudden inheritance or job change.

Linda was named "One of America's Best Financial Advisors" by Worth Magazine for over 10 years, was profiled as a "South Florida Honcho" in South Florida Magazine along with being named by Wealth Manager Magazine "One of the 50 Distinguished Women in Wealth Management". The Lubitz Financial Group was one of South Florida Business Magazines' 2008 Top 200 Businesses. She has also been consistently selected as "One of the Top Financial Advisers for Doctors" by Medical Economics Magazine. Blomberg Wealth Manager has regularly recognized the firm as one of the Top Wealth Management Firms in the country. In 2009 she was selected by the Consumers' Research Council of America as one of America's Top Financial Planners. In partnership with her husband, Norm Boone, she is co-founder of IPS AdvisorPro™, an award winning online investment policy statement application which was named by Morningstar as the "Best Software of 2006". The website, www.IPSAdvisorPro.com, provides tools to help practitioners easily and quickly develop best practice investment policy statements for their clients.

Prior to the establishment of her firm in Miami, Linda spent 18 years in banking and as president of AmeriFirst Securities Corporation, the Broker-Dealer subsidiary of AmeriFirst Bank. She was also Managing Partner of Evensky & Brown. Her professional and community affiliations have included being elected to national board of directors for the International Association for Financial Planning and subsequently, to the Financial Planning Association board. Linda is also the co-founder of the Capstone Group, a consortium of the top financial planning firms in the United States. She is an emeritus member of the TIAA-CREF Institute Advisory Board and the Florida Bankers Trust School faculty. She is a member of the Historical Association Foundation Investment Management Committee. She loves to raise herbs, perfect her cooking skills learned at various cooking schools, play tennis, learning golf with Norm and be at the beck and call of her cat. She loves to travel to many different places with her husband, Norm Boone, including a successful summit of Mt. Kilimanjaro in 2004.