

Tony Novak

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WORK EXPERIENCE

- Self-employed accountant/adviser, 1987-current
 - Compensation and benefits planning for individual clients and businesses clients
 - Client list including residents of every state and the executives of three public companies
 - Developed Freedom Benefits Association online services and related commercial insurance exchange networks under the OnlineAdviser trademark
 - Consumer finance writer for various financial service companies
 - Professional development instructor for National Seminars Training, Rockhurst University Continuing Education Program
 - Developed and sold MedSave.com
 - Recruited and trained more than 25 independent agents as producers for Fortis Financial Group producing more than \$1 million premium per year
 - Taught personal financial planning at Delaware Valley College evening school division
 - Instructor for "Current Events in Employee Benefits" a professional continuing education course offered to accountants, attorneys and financial planners
- Account Executive with Drexel Burnham Lambert in Jenkintown, Pennsylvania, 1986-1987
- Pension Accountant with Pension Plan Services Inc. in Philadelphia, Pennsylvania, 1985-1986

EDUCATION

- Chartered Healthcare Consultant Candidate, The American College
- Masters in Taxation, Villanova Law School, 1995, focus in compensation planning
- Master in Business Administration, Temple University, 1985, focus in finance & accounting
- Bachelor of Science Degree from Delaware Valley College, 1982
- Methacton High School, Fairview Village, PA 1978

LICENSES AND REGISTRATIONS

- New Jersey CPA candidate, exam complete, certification expected early 2012
- Licensed life, accident & health insurance producer in all 50 states and the District of Columbia
- NASD Series 3, 6, 7, 15, 22, 26, 65
- QuickBooks Pro Adviser, 2006
- Completed IRS-administered course on individual income tax preparation 1995
- Registered Investment Adviser, 1983-2007

COMMUNITY AFFILIATIONS, ACTIVITIES AND INTERESTS

- Member of the Rotary Club of Ardmore, serving on public relations and youth projects functions
- Member of New Jersey Association of Certified Public Accountants
- Past president of the Bucks/Mont Chapter of the National Association of Remodeling Industry
- Lecturer, writer and public advocate of climate change issues affecting the mid-Atlantic coastline
- Founder of BaySave Foundation conducting environmental research, education and advocacy