WE TAKE YOUR FINANCIAL SUCCESS PERSONALLY.

WHO WE ARE

We're a group of people that helps translate our clients' financial dreams into reality. One of the first things we say to our clients is, "We take your financial success personally."
It's not just a catchy marketing phrase. It's a way of doing business. And it takes three key ingredients.

1. **The right skills:** Smarts to develop financial and investing solutions.
2. **The right attitude:** Passion to apply our expertise to each client's unique goals.
3. **The right solutions:** Personalized strategies to achieve those goals...one client at a time.

THE RIGHT SKILLS TO CREATE CONFIDENCE

Our advisors hold multiple certifications, designations, and accreditations including:

CFP® | AIF® | CFA® | CPA®* | CLTC | CIMA®

THE RIGHT ATTITUDE TO CREATE COMFORT

We listen to learn: going beyond just the facts to the nuances of each individual's situation.

We empathize: to develop the kind of trusted relationship that leads to deeper communication.

We care: it's not about "managing client expectations" it's about really caring for our clients and going the extra mile to show it.

THE RIGHT SOLUTIONS TO EMPOWER OUR CLIENTS

When it comes to your financial security, every question holds value and deserves a thorough answer.

TAX PLANNING

How can you ensure you are taking advantage of every opportunity?

How do you keep tax burdens to a minimum?

FINANCIAL PLANNING

How will your family manage if something happens to you?

What would it take to change careers to pursue your passion?

RETIREMENT PLANNING

At what point will you feel prepared to retire?

How will you create a reliable income stream that lasts the rest of your life?

ASSET MANAGEMENT

What does your portfolio diversification look like?

How much investment risk can you afford to take?

INSURANCE PLANNING

What types of insurance are really necessary for you and your family?

ESTATE PLANNING

How often should you update your estate plan?

What's the best way to transfer wealth?

COLLEGE SAVINGS

How can you save for your children's education and still attain other goals?

HOW WE CHARGE FOR OUR SERVICES

Our compensation generally follows one of two paths: an annual retainer based on the assets under our management or an hourly engagement.

Give us a call to learn more about how we take your financial success personally.

*Inactive

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Meet Our Team

ALP A. ATABEK, AIF®, CPA*

Managing Partner

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Alp began his career as a CPA, opening a firm that focused on tax preparation and small business accounting in 1984. He enjoyed the financial planning environment so much that in 1988, he began offering his clients financial planning and investment management services to complement his tax and accounting practice. In 2000, and he sold his CPA practice to focus 100% of his efforts on helping clients with their financial planning and investment management needs. Alp brings 35+ years of industry experience to our team.

JASON W. DAHL, CFP®, CLTC, CIMA®

Partner and Director of Financial Planning Services

jasond@afsfinancialgroup.com

Jason is passionate about helping clients with their entire financial plan, from retirement, investment, and education planning, to tax optimization and legacy issues. He feels the most valuable experience for clients is to work with a qualified team of consultants capable of delivering expert advice across myriad financial planning topics. Jason joined AFS in 2007 and brings over 15 years of industry experience to the team.

OLIVIA NAKKASH DEMISSIE

Director of Operations

olivia@afsfinancialgroup.com

Born from two immigrant parents, Olivia was exposed to a wide variety of cultures and practices that taught her the value of working hard to achieve your financial goals. As a child, she grew intrigued by statistics and making sense out of random data, which led to her studying Economics at the University of Maryland, College Park. Olivia joined AFS in 2008 and brings nearly 15 years of industry experience to our team.

*Inactive

NATALIE C. ATABEK

Director of Communications

nataliea@afsfinancialgroup.com

For Natalie, growing up watching this firm develop into the company it is today has been a formative experience. Natalie was an intern at AFS every summer from 2009-13 as she completed her undergraduate studies at Davidson College, and in 2013, she joined AFS as an Operations Assistant. In 2014, she began graduate studies at the University of Maryland's Robert H. Smith School of Business, where she graduated with a M.S. degree in 2015. She rejoined the AFS team as the Director of Communications in 2016.

CHRISTOPHER R. VANDERKOLK, CFA

Investment Analyst

chrisvk@afsfinancialgroup.com

It became clear to Chris that he would work in the world of investments when he interned for a financial advisory firm as a college senior. Upon graduating from the University of Southern California with a B.S. in Business Administration, he was hired at that same firm as a full-time employee. Later, he found work in Colorado before eventually moving back to the east coast and earning his CFA credential. In 2016, Chris joined the AFS team. With over 20 years of industry experience, Chris sits on the PIMCO Next Gen Advisory Council.

JENSEN A. LOREA, CFP®

Client Relationship Manager

jensenl@afsfinancialgroup.com

Jensen grew up in Charleston, WV, as the second oldest of six kids, where he saw first-hand the importance of being pro-active and efficient when it comes to financial planning. After graduating from Edinboro University in 2018 with a bachelor's degree in Business Administration and a minor in Personal Financial Planning, Jensen moved to the D.C. are to join AFS as a Client Services Associate. In June 2021, Jensen officially obtained the Certified Financial Planner™ (CFP®) certification.

DANIEL J. KUPER, APMA®

Paraplanner

dkuper@afsfinancialgroup.com

Danny, the son of refugee parents from the Soviet Union, learned the importance of hard work and financial responsibility from a young age. Danny attended George Mason University and graduated with a bachelor's degree in finance and an associate degree in business administration. Prior to joining AFS in early 2021, Danny worked for MassMutual. Danny holds the APMA® certification and is on track to pursue the CFP® designation. He is an active member of the Financial Planning Association (FPA®).

JADE M. WILSON

Client Service Associate jadew@afsfinancialgroup.com

Witnessing her parents manage their household despite their financial difficulties is what sparked Jade's interest in financial planning. Jade graduated from the University of Maryland, University College with a B.S. in Finance and a minor in Business Law & Public Policy. Upon graduation, she worked as an Accounting Assistant in Washington, D.C., before taking some time to travel internationally. She later worked as a Product Management Specialist, followed by roles as a Transfer Agent and Fund Administrator before joining AFS in early 2022.

ERIK D. BOWEN-COLLINSON

Office & Operations Manager erikbc@afsfinancialgroup.com

Erik grew up in a small town in the San Francisco Bay Area before his family moved to Northern Virginia when he was in eighth grade. While he started off in math and science at James Madison University, he rediscovered his love for the arts and graduated with a B.A. in Art History. Erik has worked in the arts, non-profits, and the Virginia wine industry in roles that have allowed him to hone his skills in building relationships, reinforcing operational foundations, and encouraging the best in his teams. He joined the AFS team in 2021.

TERESA A. RAAD

Administrative Receptionist terir@afsfinancialgroup.com

Before becoming a part of the AFS team, Teri gave back in a variety of ways throughout her career, including volunteering and providing administrative support at the Upper Chesapeake Hospital, instructing classes on Professionalism in Health Care and billing at Harford Community College, and serving as a Research Assistant for a Parkinson's disease study. Teri joined AFS in early 2015. She is a people person who values being a part of a team that helps people achieve their retirement and financial life goals.