Rick Darvis, CPA, CCPS
Biography & Fact Sheet

Rick is recognized as one of the leading experts in the college funding field. He has written more books, developed more software, and trained more financial professionals on the topic of college funding than any other person in the United States. He is a co-founder and director of the National Institute of Certified College Planners. His knowledge has enabled him to be invited to speak on the topic of college funding to his contemporaries at state CPA and FPA conferences in over 40 states. He has been a featured speaker at the Financial Planner Association's Success Forum, the Northeast /Mid-Atlantic National Association of Personal Financial Advisors (NAPFA) regional conference, the National Employee Benefit Forum, the New York Society of CPAs Personal Financial Planning Conference, and the AICPA's Tax Strategies for the High Income Individual Conference. Rick has also given seminars for the University of Arizona and the New York Student Financial Aid Administrators.

Rick's accomplishments in the college-planning field are:

- Co-author of ***Paying for College: Tax Strategies and Financial Aid***, a guide published by the American Institute of CPAs on college planning for accountants and financial advisors.
- Author of ***CollegeSOLUTION***, a step-by-step program for implementing a turnkey college funding service for accountants and financial advisors.
- Contributing author of ***Personal Financial Planning***, a Practitioners Publishing Company (PPC) guidebook.
- Co-author of ***Planning for College Costs***, a Practitioners Publishing Company (PPC) guidebook on college financial planning for accountants and financial advisors.
- Author of ***A Roadmap to College & Retirement – Without Going Broke***, a book designed to link college planning to retirement planning.
- Provider of education programs for organizations, such as Microsoft, American Institute of CPAs, Oppenheimer, Western CPE, OneAmerica Insurance, State Farm Insurance, National Assocation of Personal Financial Advisors, Northwestern Mutual, Manulife, MFS, American Skandia, Franklin Templeton, Eastern Bank, US Bank, Wells Fargo, Linsco Private Ledger, Securities America, Genworth, Lincoln Financial, UBS, Wachovia, Smith Barney, John Hancock Financial Network, Legg Mason, Edward Jones, Chase Bank, and Raymond James.
- Quoted in: ***Forbes, CNN-FN, Newsweek, U.S. News and World Report, Money, Business Week, Kiplinger's Personal Finance, NY Times, Smart Money, Wall Street Journal, Bloomberg's Personal Finance, Bankrate, Nation's Business, Financial Advisor, Dow Jones Newswire, On Investing, Knight Ridder News, Mutual Fund Market News, Research Magazine, Practical Accountant, Offspring, LIMRA's Market Facts, NAPFA Advisor, and AICPA's Planner.***