



## Gary L. McPherson, II

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[www.thomasgroupinc.com](http://www.thomasgroupinc.com)

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### Qualifications

#### Education and Professional Designations

Certified Long Term Care (CLTC)  
B.S., Business Management, Towson University  
Financial Planning Track, Towson University  
Bachelor's of Science, Psychology, University of Pittsburgh  
Life & Health License: Maryland, District of Columbia,  
and Virginia  
Securities Licenses: Series 6, 63

#### Individual Client Services

Investment review and portfolio analysis  
Budget Analysis  
Asset Allocation Needs  
Goal Planning Needs  
Survivor Income Needs  
Education Planning Needs  
Retirement Income Needs  
Income Distribution Needs

#### Corporate Client Services

Business Continuation Assessment  
Deferred Executive Compensation  
Key Person Protection

#### Retirement Plans Services

ERISA Compliance/404(c) Assistance  
Fiduciary Education  
Plan Features and Design Consultation  
Plan Investments Assessment  
Provider/TPA Comparison and Consultation  
Employee Enrollment Meetings  
Employee Retirement Consultation  
Employee Rollover Services  
Plan Benchmarking Analysis  
Plan Cost Evaluation

#### Qualified Retirement Plan

401(k) & Individual 401 (k) Plans  
457 and 403(b) Plans  
Defined Benefit & 412(i) Plans  
Profit Sharing Plans  
Cash Balance Plans  
SEP & SIMPLE IRA Plans

#### Associations and Memberships

Jewish Community Center of Greater Washington, Member  
University of Pittsburgh Alumni Association, Life Member  
Matawan-Aberdeen Regional High Football Alumni &  
Hall of Fame, Member and Honoree

#### Personal Facts

Married with two children  
Montgomery County, MD resident since 2004  
Born and raised in Matawan, NJ

*Employee of The Thomas Group, Inc, since 2008*

*Representing Harry L. Thomas, Jr., since 2008*

#### Thomas Group, Inc. Mission Statement

The ambition of The Thomas Group, Inc. is to provide our clients with an unparalleled experience of service excellence and to provide our clients with the best possible advice over and over. Our business is built on four pillars. First, we will always strive to do what we say we'll do when we say we'll do it (accountability). Second, we want to say "please" and "thank you" (gratitude). Third, we want to show up on time (respect for our clients). And, fourth, we want to *always* do the right thing (integrity). If we follow our mission every day, good things happen for us and our clients on a daily basis.