

Our Timeline

A History of Special Needs Financial Planning and Our Decades of Advocacy

John Nadworny, CFP® (J)
Cynthia Haddad, CFP® (C)
Alexandria Nadworny, CFP® (A)

1990's

- ❖ Building the foundation for Special Needs Financial Planning; John Nadworny, CFP® and Cynthia Haddad, CFP®, a parent and a sibling, begin working together as team.
 - Board Member of EMARC -(J)
 - First Sibling Support program sponsored by Greater Boston Arc- (C)
 - Board member for Arlington ARC- (C)
 - Citizens Advisory Board Member – Massachusetts Department of Developmental Services, Residential Quality control committee (C)
 - Waiting List subcommittee member, Governors Commission On Intellectual Disabilities- (J)
 - Sponsored statewide Housing conference coordinated by Massachusetts Families Organizing For Change- (J)
 - A sponsor and speakers at the first statewide family housing conference, Coordinated by Massachusetts Families Organizing For Change (MFOFC) - (J)
- ❖ First Financial Planning Workshop, Charles River ARC*
 - Appointed To Governor's Commission On Intellectual Disabilities- (J)
 - Chair Subcommittee on Private-Public Partnerships for Residential services- (J)
 - Family To Family Advisory Board Member -(J)

- Participated in Ironman USA, raised \$140,000 to help continue Family To Family funding - (J)
- Advisor to the MARC Trust, now PLAN of Massachusetts- (J)
- Contributing authors to “Passport to Independence: Home, Work & Community a manual for families” in collaboration by Specialized Housing, Inc. and its Advisory Board*- (J) (C)
- ❖ Created “A Letter of Intent” in fill-in-the-blanks format (J) (C)
- ❖ Formed Special Needs Planning, LLC- (J) (C)
- ❖ Launched our first Special Needs Planning Website at www.specialneedsplanning.com - (J) (C)
- ❖ Presented educational workshops to over 100 agencies across the state (J)(C)

2000's

- Appointed to Massachusetts Statewide Quality Control Council - (J)
- Wrote the proposal for Qualified Disability Savings Account, approved by George Bush's President's Committee for Intellectual Disabilities - (J)
- ❖ Co-Authored “The Special Needs Planning Guide; How to Prepare for Every Stage of Your Child's Life” (Brookes Publishing Co.)*- (J)(C)
- ❖ Contributing authors of “Special Needs Planning Guide for Families”
 - Member Board Of Directors for The Arc of Massachusetts - (J) (C)
 - Chair for The Arc of Massachusetts 50th Anniversary Gala - (C)
 - Member Board Of Directors for Massachusetts Down Syndrome - (J)
 - Sponsored Housing Conferences; MFOFC- (J)
- ❖ Presented at the Certified Financial Planners National Conference (J)(C)
 - i. Covered by Boston Globe, New York Times, USA Today, Kiplinger's Chair Subcommittee on Private-Public Partnerships for Residential services- (J)
 2. ➤ Family To Family Advisory Board Member -(J)
 3. ➤ Family To Family Steering Committee Chair - (J)

- ❖ Presented at the Certified Financial Planners National Conference (J)(C)
Covered by Boston Globe, New York Times, USA Today, Kiplinger's
- ❖ Presented at the Certified Financial Planners National Conference (J)(C)
- ❖ Covered by Boston Globe, New York Times, USA Today, Kiplinger's Journal, Wall St Journal(J)(C)
- ❖ Presented educational workshops to over 100 agencies across the country (J)(C)

2010's

- Completed 5th term Of Governor's Commission - (J)
- Featured planner in Money Magazine Article "Raising Finn" - (J)
- Appointed to the Advisory Board for "The Real Lives Bill" - (J)
- Collaboration to create "Building A Home Toolkit CD; A Compilation of Resources" (J)
- Task force for Future Planning, Massachusetts Department of Developmental Disabilities - (J)
- ❖ Alexandria Nadworny CFP® joins the practice
 - Volunteer for Junior Achievement at the Northshore Education Consortium Upper School- (A)
 - Volunteer at Annual MDSC Brother and Sister Workshops- (A)
 - Member Of the Metro North Citizens Advisory Board (J)(C)
 - Selected as an 'emerging leader' for the DDS Leadership Development Initiative - (A)
 - Attendee of the 2015 Family Leadership Series- MFOFC - (J) (A)
 - Member Board of Directors for Massachusetts Sibling Support Network - (C)
- ❖ Members, Academy of Special Needs Planners - (J) (C) (A)
 - Published "SibTips" an e-book for brothers and sisters of individuals with special needs. (C) (A)
- ❖ Under contract to write a book on Housing for Brookes Publishing Co. (J) (C)
- ❖ Members, The Financial Planning Association 20 years (J) (C)
- ❖ Presented educational workshops to over 50 agencies across the country (J) (C)(A)