

Item 2 – Educational Background and Business Experience

Name: Bryan J. Lohr

Year of Birth: 1965

Education:

2018	Series 65, Uniform Investment Adviser Law Exam
2017	CFP® Professional Certification Exam
2017	Certificate in Financial Planning, George Mason University
1992	Master of Business Administration, George Mason University
1987	Bachelor of Science, Business, Virginia Polytechnic Institute and State University Major: Marketing Minor: Professional Writing and Communications
1994-2015	Various continuing education certificates in software development and database design and development from Northern Virginia Community College, Montgomery College, and Learning Tree International

Business Experience:

2018-present	Founder/Owner/Managing Member, Present Value Financial Services® LLC
2015-2018	Pursuit of educational and regulatory requirements to enter financial services industry
1999-2015	Senior Systems Analyst, Westat, Inc.
1993-1999	Systems Analyst, Westat, Inc.
1989-1993	Programmer/Analyst, Westat, Inc.
1987-1989	Research Assistant, Westat, Inc.

Professional Affiliations and Designations

2016-present	Financial Planning Association®
2022-present	National Association of Tax Professionals
2023-present	AFSP (IRS Annual Filing Season Program) ⁷

⁷ For Annual Filing Season Program requirements, see <https://www.irs.gov/tax-professionals/general-requirements-for-the-annual-filing-season-program-record-of-completion>.