

# Financial and Advocacy Services

The following organizations have expressed interest in being included in a resource list for individuals and families. This list includes financial planners, specific departments of banks, investments specialists, and advocates. They are all knowledgeable in the areas of meeting lifelong financial needs of an individual with a disability. This is not intended to be a complete list of those who practice in this area. The Arc of Frederick County does not endorse anyone whose name appears on this list.

### **Financial Services**

Ashley D. Goldsborough, CTFA  
Vice President Trust Administration  
The Family Heritage Trust Company  
30 West Patrick Street, Suite 100  
Frederick, Maryland 21701  
301.631.5900

Josie Hoffman, CFP, CRPC, ChSNC  
Senior Financial Advisor  
Merrill Lynch  
30 West Patrick Street, 4<sup>th</sup> Floor  
Frederick, Maryland 21701  
301.698.4732

[www.fa.ml.com/josie\\_hoffman](http://www.fa.ml.com/josie_hoffman)

Eric Jorgensen, CFP, ChFEBC  
Turning Point Financial  
7210 Corporate Court, Suite A  
Frederick, Maryland 21703  
301.846.9336  
[eric@tpfinancial.com](mailto:eric@tpfinancial.com)

Monty Knittle and Jim Curran  
The Curran/Knittle Group  
2230 West Joppa Road, Suite 160  
Timonium, Maryland 21093  
410.659.8919

The Berkheimer Group  
At Morgan Stanley  
30 West Patrick Street, 7<sup>th</sup> Floor  
Frederick, Maryland 21701  
301.663.8833

Maryland Financial Planners  
201 Thomas Johnson Drive, Suite 200  
Frederick, Maryland 21702  
301.663.5454

### **Advocacy Services**

By Their Side  
Lifelong Advocates for Marylanders with  
Developmental Disabilities  
Kathy Vecchioni  
Executive Director  
7215 York Road, Suite 352  
Baltimore, Maryland 21212  
443.279.1234  
[www.bytheirsideside.org](http://www.bytheirsideside.org)