

Background information regarding
Ronald Scott Colson, CFP®, MBA, President

Formal Education after High School:

- *Fall 1970 through spring 1972:* Colorado Mountain College, Glenwood Springs, Colorado. Associate of Arts degree, biology major. (Phi Theta Kappa)
- *Fall 1972 and fall 1974:* World Campus Afloat, Chapman College, Orange, California. Attended two semesters-at-sea. Biology major.
- *Spring 1973, and spring 1974 through spring 1975:* University of Colorado, Boulder, Colorado. Bachelor of Arts degree, biology major. (Phi Beta Kappa)
- *Fall 1975 through spring 1976:* University of Denver, Denver, Colorado. Attended one year as a Graduate Teaching Assistant for the Dept. of Biology.
- *Fall 1986 through spring 1989:* University of Colorado, Boulder, Colorado. Master of Business Administration degree, finance major. (With Honors)
- *Fall 1990 through spring 1993:* College for Financial Planning, Denver, Colorado. Certified Financial Planner® designation.
- Continuing education has been successfully completed each period since 1987 as required to satisfy the Colorado Division of Insurance CEU requirements and since 1993 as required to maintain the CFP® designation.

Business Background since 1987:

- *May 1987 through July 1989:* Field Underwriter for New York Life Insurance Company and Registered Representative of broker/dealer NYLIFE Securities Corp., Denver General Office, Denver, Colorado. TAS Agent of the Year, 1988. Voluntarily terminated to be able to offer clients products from a broad range of insurance carriers and investment managers.
- *July 1989 through October 1991:* Proprietor of Colson Financial Group, an independent insurance brokerage, Lakewood, Colorado. Registered Representative of broker/dealer GDN Securities Ltd., Englewood, Colorado. Colson Financial Group was incorporated to become Colson Financial Group, Inc. and GDN Securities Ltd. was purchased by Miller Financial Group, Minneapolis, Minnesota. Both changes occurred in October 1991.
- *October 1991 through February 1996:* Registered Representative of Miller Financial Group. Voluntary terminated all broker/dealer affiliations to eliminate potential conflicts of interest with Colson Financial Group, Inc., which became a fee-only (non-commissioned) Registered Investment Advisor.
- *October 1991 to Present:* President, Colson Financial Group, Inc.

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