The Shaeffer Wealth Advisory Group

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Founded by Charles Wayne (Pete) Shaeffer Jr. in 1982, The Shaeffer Wealth Advisory Group has been working as a team of financial professionals for more than 35 years. The group is dedicated to high standards of ethical and professional excellence. They concentrate on the active management of personal, professional and retirement accounts.

Currently with more than $1.2 billion of assets under management, The Shaeffer Wealth Advisory Group has devoted itself to addressing the individual financial needs and objectives of each client. More than 100 years of combined investment experience makes them uniquely prepared to assume the role of trusted and dedicated investment advisor. Through the vast resources of RBC Wealth Management, The Shaeffer Wealth Advisory Group has access to professionals with expertise in financial, retirement, and estate planning, equity research, and fee-based individual portfolio management.

H. James Smith III

Senior Vice President – Financial Advisor
Senior Consulting Group

(410) 318-5090 | jim.smith@rbc.com

Jim began his finance career in 1983, as an original member of the team.

He was born and raised in Baltimore, where he attended St. Paul's School. He graduated from Ithaca College in 1976. Jim has served as a president of the board of St. Paul's School, as a trustee for the University of Maryland Research Fund, and as a board member of the Jefferson Park and Museum, the Keswick Foundation, and the Corporation for Widows and Orphans. Jim is currently a member of the advisory board of the Bridges Program at St. Paul's School, which is committed to the long-term success of Baltimore City Youth. Jim was recently asked by the Baltimore Community Foundation to be an inaugural member of the Professional Advisor Recognition Society in appreciation of his work to advance and encourage charitable giving across Baltimore.

Jim resides in Ruxton with his wife, Maureen. They have three sons.

RBC® Wealth Management

John H. Sutton Jr., AWM

Senior Vice President – Financial Advisor
Senior Consulting Group

(410) 318-5095 | john.h.sutton@rbc.com

John has worked many sides of the business, starting out as an intern in 1996 at Wheat First Butcher Singer where his passion for helping people with their finances led him to The Shaeffer Wealth Advisory group as a client associate in 1997. He's held his current position since 1999 and continues to provide guidance to his clients to not only help build wealth, but preserve it for generations.

John believes it's most important for our clients to have trust in what we do and he makes this a priority when working with them. He looks to provide financial guidance on all aspects of our clients' lives, both current and long-term, including retirement savings, home purchases, college planning and estate planning services to create a well-balanced, thought-out, personalized plan. This approach provides our clients and their families the ability to stick to the plan through all market cycles.

A Baltimore native, John graduated from the University of Baltimore with a Bachelor of Science degree in economics. He received RBC Wealth Management's internal professional designation of Accredited Wealth Manager (AWM), designed to provide financial professionals with training in advanced wealth management strategies. This accreditation is offered exclusively by RBC Wealth Management to a select group of its financial advisors. This advanced-level program builds on the fundamentals of wealth management with a focus on estate planning services, insurance solutions, advanced investment strategies and business succession planning.

John resides in Kingsville with his wife, Linda, and their two dogs and cat. They enjoy spending time with their four children and granddaughter.

Bryon P. Epple, CPFA, MBA

Senior Vice President – Financial Advisor
Senior Portfolio Manager – Portfolio Focus

(410) 318-5093 | bryon.epple@rbc.com

Bryon started with The Shaeffer Wealth Advisory Group in 1997 and works directly with high-net-worth families and retirement plans, while managing the growth and dividend portfolios for the team. For more than 20 years, he's been focused on his attention to the client experience and the level of service we aim to provide our multigenerational families, businesses, and new and lifelong clients. Pete, our founder, has instilled in him the idea that clients come first no matter what the situation and it's become a foundation in how we run our business today.

When it comes to working with families, Bryon gets to know their goals and aspirations to develop a customized, long-term plan that includes wealth accumulation, distribution, tax and estate planning strategies. Along the way, he helps adjust the plan as life happens. He helps give his clients confidence knowing that their assets will provide for their lifetime and describes seeing his clients reach their life goals as the most rewarding parts of his job.

Bryon also specializes in retirement plans and offers retirement plan services for private companies and nonprofit organizations. He's received his Certified Plan Fiduciary Advisor (CPFA) designation from the National Association of Plan Advisors, a credential developed by some of the nation's leading advisors and retirement plan experts that demonstrates knowledge, expertise and commitment to working with retirement plans.

Bryon received his Bachelor of Arts degree in economics from the University of Maryland, Baltimore County and his MBA with an emphasis on corporate finance from Loyola University of Maryland's Sellinger School of Business.

Bryon resides in Forest Hill with his wife, Erica, and three children. In his free time, he enjoys playing soccer with his kids, golfing, trips to wine country and walking his favorite dog, Axle.

Daniel A. Petro, CFP®, CPFA

Financial Advisor

(410) 318-5086 | daniel.petro@rbc.com

Daniel is a financial advisor with The Shaeffer Wealth Advisory Group. He began his career in 2007 with Ferris, Baker and Watts, now RBC Wealth Management. Dan is one of the team's CERTIFIED FINANCIAL PLANNER™ practitioners. He works directly with high-net-worth clients, children and grandchildren of multigenerational families, and international clients. He is also heavily involved with the team's retirement plan partners, working with plan sponsors and conducting education for plan participants.

Raised in Anne Arundel County, Dan graduated from Towson University with a Bachelor of Arts degree in business administration in 2007. He has passed the Series 7 and 66 exams, and holds his Maryland life and health insurance licenses. Dan obtained his Certified Plan Fiduciary Advisor (CPFA) certification in 2020.

Dan lives in Ellicott City with his wife, Molly, and their cat, Hazel. In his free time, Dan enjoys maintaining and modifying cars and working on home improvement projects.

Matthew A. Citrano, CFP®, APP

Senior Investment Associate

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Matt is a registered client associate with The Shaeffer Wealth Advisory Group. He began his career at RBC Wealth Management in February 2015. Matt is a Baltimore native, attending Calvert Hall College High School before obtaining his bachelor's degree in business administration from High Point University in 2013. In 2018, Matt was nominated to serve on RBC Wealth Management's Client Associate Advisory Council. He has passed his Series 7 and 66 exams, and holds his Maryland life and health insurance licenses, which he uses to assist the team in the areas of insurance and annuity planning. In 2020, Matt received RBC Wealth Management's internal professional designation of Associate Planning Professional (APP). Matt is also one of the team's CERTIFIED FINANCIAL PLANNER™ practitioners, obtaining the certification in 2021.

In his free time, Matt enjoys live music, snowboarding and playing golf. He currently resides in the Fells Point neighborhood of Baltimore.

Melissa Yokemick

Marketing Associate

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Melissa works with the team to deliver high-quality, personalized client service through our marketing efforts. She started her career in B2B sales at Staples Business Advantage, working in print and marketing, and business development. She then joined Republic National as a sales representative in their spirits division, working with restaurants in the downtown Baltimore area to drive sales for well-known spirit brands. Her responsibilities also included planning and executing programs and special events. Now, she's looking forward to bringing that experience to the team to further enhance our client experience.

Melissa has a Bachelor of Arts degree in communications with a minor in marketing from Salisbury University. She lives in the Locust Point neighborhood of downtown Baltimore with her fiancé, Jordan, and dog, Anderson.

Tracy McCrory

Client Associate

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Excited to combine her passions for the finance industry and helping people, Tracy joins us as the newest member of The Shaeffer Wealth Advisory Group. She started her career in the insurance industry before joining RBC Wealth Management in July 2021 as a client associate.

A Catonsville native, Tracy acquired a Bachelor of Science degree in management from Salisbury University in 2016. She holds her property and casualty insurance license and is studying for the Series 7 exam.

In her free time, Tracy can be found at Trader Joe's, watching gameshows with her grandfather, or working toward checking off her bucket list item of visiting every MLB stadium.

Wealth Management

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