



FOR IMMEDIATE RELEASE

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David M. Taube Has Been Admitted to the Paladin Registry

Sacramento, CA - Paladin announced that David M. Taube has been admitted to the Registry and he has been awarded Paladin's Five Star quality designation.

The Paladin Registry (www.paladinregistry.com) provides free public services to investors who use the services of financial planners and advisors. Since its inception, more than 300,000 investors have used the Registry to learn how to avoid bad financial advice, select high-quality advisors, find competent, trustworthy professionals, rate current advisors, and review advisor documentation for credentials, ethics, and business practices.

Jack Waymire, Paladin founder and author of the highly regarded book **Who's Watching Your Money? The 17 Paladin Principles for Selecting a Financial Advisor** (ISBN 0471476994, John Wiley & Sons, December, 2003) said "Registry services solve three major problems for investors who rely on planners and advisors to achieve their financial goals. First, it's not easy for investors to find high quality advisors. Second, when they find advisors they may not know the right questions to ask to determine their quality. And third, they may not know good answers from bad ones. Consequently, millions of investors hire the wrong advisors for the wrong reasons and fire them within two years."

Waymire went on to say, "The Registry solves the quality problem by having the highest minimum standards in the financial services industry. Planners and advisors must complete a comprehensive questionnaire and score in the top 10% of their profession to be admitted to the Registry. In addition, they must be Registered Investment Advisors (RIAs) or Investment Advisor Representatives (IARs), acknowledge their fiduciary status, provide independent advice, and work for fees."

Waymire confirmed that only a small percentage of practicing planners and advisors can meet the Registry's strict requirements. He said, "We focus on the top tier of professionals who are paid to help investors achieve their financial goals. We exclude the bottom 90% who are frequently paid commissions to sell investment and insurance products. Anyone who isn't paid to help investors achieve their financial goals is a potential risk."

He added, "This risk exists because the financial services industry has no minimum standards for advisors. There are no education requirements, not even a high school diploma, and no experience requirements. In fact, 18 year olds and people with criminal records can obtain securities licenses. The combination of no standards and no disclosure requirements create a major risk for investors and the Paladin Registry is one of the few resources that help them avoid the risk."

About Paladin Registry, LLC

Paladin is an information services company and not a financial services company. The Registry provides free public services to investors who use the services of financial planners and advisors. The four primary services are investor education, advisor search, advisor ratings, and advisor documentation. Visit Paladin's website at www.paladinregistry.com for additional information.

About David M. Taube

David M. Taube, CPA, CFA, CFP[®], CRI is founder and president of Kalorama Wealth Strategies, a fee-only investment advisory and financial planning firm in Washington, D.C. David's mission is to help professionals, business owners, and their families achieve greater financial security and independence.

David specializes in the development and implementation of investment and retirement plans, and the prudent management of assets, the essential building blocks necessary to achieve financial goals. He also assists clients with other aspects of their financial planning, including cash flow management and net worth analysis, insurance review, tax analysis, and estate plan review.

David has more than 10 years experience in the financial services industry. He has provided investment management consulting services to Registered Investment Advisers by helping them with business development, asset allocation and portfolio construction, and investment analysis and selection. He also established an investment research department for a Registered Investment Adviser which manages investment portfolios for institutions and high-net-worth individuals.

David is uniquely qualified to advise individuals regarding their investments and financial planning matters. He is a CERTIFIED FINANCIAL PLANNER (CFP)[™] professional and a member of the Financial Planning Association; Chartered Financial Analyst (CFA) charter holder, with membership in the CFA Institute and the CFA Society of Washington, D.C.; Certified Public Accountant (CPA) licensed in the State of Maryland; and a Chartered Realty Investor (CRI).

David received a Master of Science in Accounting from American University, where he is also an adjunct professor in the Kogod School of Business Administration, and a Bachelor of Science in Business Administration from Towson University.

Please visit Kalorama's web site at www.kaloramawealth.com for additional information.

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