

LEADERSHIP IN ACTION

FPA members inspire others in many ways, helping lead in their practice, local chapter, community, family, and especially with their clients. FPA Leadership in Action helps highlight these “everyday” qualities of our members and remind us that we all have opportunities to lead.



Marguerita “Rita” Cheng,
member since 2002

Ameriprise Financial Services,
Bethesda, Md

“Leadership should be more participative than directive, more enabling than performing.”

—Mary D. Poole

JUST DO IT

A Leader in the Profession

Rita is the 2012 President of FPA of the National Capital Area. A candid and passionate advocate for diversity, and particularly dedicated to increasing investor education and financial empowerment in multicultural and diverse communities, Rita has been the chair of the FPA Diversity Scholarship Sub-Committee for three years and is currently co-chair of the 2012 FPA Diversity Committee.

“Under Rita’s supervision, we helped run an excellent scholarship campaign,” said a fellow FPA Diversity Committee member. “By all accounts, Rita is personable, professional, and is extremely willing to step in and help when called upon.”

Another close colleague says of Rita: “Simply put, Rita just *does* it. A lot of people talk about doing things; leaders actually get it done, and that’s Rita. The catchphrase ‘Git-R-Done’ aptly describes Rita.”

Although Rita is successful and well-respected in the financial planning community, she never hesitates to put her family first, and she knows her clients feel the same way. Colleagues agree that her strong core value for family extends to her strong work ethics.

Lessons Learned

- Focus on getting the job done right the first time, and disregard barriers.
- Continuously fine-tune your work-life balance; it’s important for your own happiness, and it also significantly boosts productivity.
- Always step in and volunteer time to give back to your profession to help create a world where everyone can thrive and prosper.

Rita’s Leadership Portfolio

In addition to Rita’s significant roles with FPA and her local chapter, she is a recipient of Ameriprise’s Presidential Award for Quality of Advice and the prestigious Japanese Monbukagakusho Scholarship. She has also contributed to countless financial articles in a variety of notable publications. Rita is a CFP® practitioner and also serves as a CFP Board Ambassador.