

NEWS

For Immediate Release

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CARDINAL
RETIREMENT PLANNING, INC.

Cardinal Retirement Planning, Inc.’s President and CEO named to Durham Land Trust Board

*North Carolina firm continues to grow community
involvement initiatives*

CHAPEL HILL AND DURHAM, NC, (December 22, 2022) – [Cardinal Retirement Planning, Inc.](#) (Cardinal), a Registered Investment Advisory firm anchored in North Carolina and serving discerning clients nationwide, recently announced that President and CEO Doug “Buddy” Amis was named as a board member to the Durham Community Land Trustees (DCLT). Cardinal is also continuing its work with non-profit organization, Book Harvest, sponsoring the annual Dream Big MLK Day Book Drive & Community Celebration for Book Harvest and donating a total of \$15,000 over the past three years.

DURHAM LAND TRUST

Established in 1987 by a group of neighborhood residents in response to rising housing prices and absentee landlords, [DCLT](#) is a nonprofit community land trust that builds strong communities by developing, managing, and advocating for permanently affordable housing. DCLT offers residents with low and moderate incomes a stable foundation for achieving economic security in Durham, NC.

Amis is filling a public representative seat; these members are one-third of the board and are chosen for their relevant professional knowledge that can be utilized by DCLT. The other two-thirds is comprised of land trust residents and community representatives. As a board member, Amis is committed to upholding the current principles and strategic priorities while taking on responsibility for the fiscal stability and future success of the organization in the interest of the leaseholders, residents, and members.

“I stand with DCLT. It’s truly an honor to join all the board members and staff, past and present, in supporting such an important cause and wonderful organization,” said Amis.

BOOK HARVEST

Amis becoming a DCLT board member continues Cardinal’s trend of community involvement. The firm also works with [Book Harvest](#), a nonprofit organization that provides books and literacy support to children and families in Durham County, Winston Salem, Columbus County, and Bladen County, North Carolina.

Headquartered in Durham, Book Harvest focuses on making sure kids have access to books not just at school or home, but wherever they are, from birth onward. They do this by placing bookshelves and boxes of free books, dubbed Book Boxes, for kids to take home as their own in local spaces where kids spend time such as doctor’s offices, childcare centers, laundromats, schools, and parks. They also have thriving direct-placement programs, partnering with schools for Books on Break and parents through Book Babies. This will be the third year Cardinal has sponsored the annual [Dream Big MLK Day Book Drive & Community Celebration](#) for Book Harvest, donating a total of \$15,000 to date.

“Book Harvest is a cause close to my heart,” said Cardinal’s Director of Operations Erica Patella. “I’m looking forward to spending a day giving back to the Durham community with the team.”

ABOUT CARDINAL RETIREMENT, INC.

Cardinal Retirement Planning, Inc., (Cardinal) is an independent, fee-based wealth management firm based in Chapel Hill and Durham, North Carolina. At Cardinal, life is not a mathematical equation and people are not treated like numbers. Cardinal’s recommendations apply financial planning principles and cite tax code while also incorporating practical, real life solutions that are unique to the needs of each client. As investment advisor representatives, Cardinal’s advisors work as fiduciaries; this means that the Cardinal team of advisors places client needs first, and conflicts of interest are shared and mitigated. There is no sales pitch. There are no smoke and mirrors. Client goals become Cardinal’s goals. The Cardinal team provides both one-time and ongoing financial planning and consulting services, portfolio management, and econometric consulting to its clients. Cardinal’s proprietary portfolio allocation software, PADME, allows the team to analyze and allocate all types of assets and investments, including stocks, bonds, mutual funds, real estate, and alternatives. Cardinal works primarily with pre-retirees and retirees in addition to high-net-worth clients, businesses, and non-profits that often have non-retirement goals. Cardinal helps its clients in many areas, including cash flow strategy, retirement planning, tax planning, estate planning, insurance reviews, alternative assets, and college planning. To learn more about Cardinal Retirement Planning, Inc., please visit: www.PlanWithCardinal.com

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