

Thanks to all our members who joined us at the Fall Retreat this September and for those who couldn't make it, you missed out on a great event! The new venue of Normandy Farms offered a great spot to hear our presenters, spend time with sponsors and network with fellow FPA members.

Matt Oechsli kicked off the morning with an excellent program discussing deepening client relationships and building new high net worth client connections through a combination of business and social activities. Top advisors with whom he consults are having great success in growing their practices in what Matt called the next big wave of business development, bigger than what cold calling and seminar marketing were of decades past and a methodology that is a must for advisors of the future. He clearly resonated with the audience as we had to pull him off the stage as time ran over despite still fielding great questions and insight from FPA members.

Joel Weiner was back after an absence of a few years once again presenting his humorous and creative style of the two hour ethics program. Meanwhile those in the breakout sessions were updated on "Smart Beta" investment strategies by our Gold Sponsor Schroder Investments and Stephen Kwa. Stephen mapped out the various active and rules based strategies employed by many portfolio managers and advisors. He covered the advantages, potentially hidden risks and means to evaluate the various techniques.

Peg Calvario delivered a practice management session showing how to prevent the urgent from getting in the way of the really important. She demonstrated how to break down goals and activities for the year into quarterly, weekly and monthly steps in order to keep the big stuff from being pushed back by the immediate and daily interruptions we all face in our businesses.

After breaking for the morning and lunch, nearly 50 golfers headed across the street for an outing at Blue Bell Country Club on what turned out to be a perfect day. Also for the first time a few members headed to the tennis courts to work with the local pro and wound up playing what the participants are now calling the first annual FPA Tennis Open.

Hope to see you soon November 12th at the Crowne Plaza Hotel in King of Prussia for our final meeting of 2014 **AND** mark your calendars for May 5, 2015 for the Spring Symposium and Keynote Speaker Steven Forbes. Expect to see more details on our slate of programs for next year. If you're interested in helping out on the Education/Programs Committee, we're looking for some additional committee members. Contact me at peter.gutekunst@raymondjames.com.