FPA FINANCIAL PLANNING ASSOCIATION OF THE PHILADELPHIA TRI-STATE AREA

So much going on...and so much more to come.....

While you were hopefully enjoying some well-deserved vacation time, we have been busy behind the scenes working on migrating to a new website, establishing a fresh newsletter format and meeting registration systems.

Some other changes that we have initiated this year are the Regional Study Groups, Happy Hours and NexGen events. We are actively seeking ways to get more of our members and partners engaged. Watch for announcements about regional events in your area.

I look forward to seeing many of you at the at the upcoming Fall Retreat, September 16th, to be held at Normandy Farm Hotel and Conference Center in Blue Bell. It will be followed by an afternoon of optional activities including golf, tennis or lessons to hone your golf or tennis skills at Blue Bell Country Club.

Get Involved…Grow….Have Fun…..Join a Committee!

FPA is committed to provide you with the resources you need to grow and thrive professionally. At the chapter level we offer lots of opportunities to help you through every stage of your career journey. We encourage you to get involved, meet new people, share ideas, learn new skills and give back. To help you decide *how*, we have included a brief description of the various committees and who to contact.

Career Development: Be a mentor; reach out to students; encourage new financial planning professionals; provide new skills for experienced practitioners.

- Mentor one new planner for three months
- Help coordinate a study group for students
- Get involved in Career Day

Contact: Sameer Somal Sameer.somal@gmail.com

Public Awareness: Elevate public awareness; promote financial literacy.

- Provide planning services to soldiers deploying overseas and their families
- Create a new Financial Planning Week event
- Share FPA's consumer articles with the media

Contact: Scott Kaminsky Scott.Kaminsky@wellsfargoadvisors.com

Government Affairs: Help shape legislation and the future of the profession.

- Participate in our Legislative Days Event
- Interact with local legislators on the pending financial reform legislation

- Attend a hearing on advisor regulatory issues

Contact: Nick Maningas nmaningas@linc-mort.com

Media Relations / Marketing: Sharpen your communication skills; develop local media contacts; help provide content for our newsletter; promote chapter events.

- Provide content for the web site or newsletter
- Promote our chapter events
- Develop ideas for press releases and articles
- Participate on our Media Response Team
- Develop a relationship with your local newspaper editor

Contact Steve Krzywicki Steven.j.krzywicki@ampf.com

Membership: Help retain current members and recruit new ones.

- Speak at area CFP® certificant programs about the value of membership
- Make phone calls to welcome new members and retain current ones
- Distribute membership information at meetings
- Coordinate the annual New Member Breakfast

Contact: Chris Bertram Chris.Bertram@marsh.com

Allied Professionals: Expand our network to include professionals in allied fields, such as estate attorneys, CPAs and accountants, career coaches, CFAs, etc.

- Help plan a networking event for allied professionals
- Use your contacts in other organizations to cross-publicize events

Contact: Bill Love Blove4042@ymail.com

Business Partners: Create alliances with partners so we can provide more member services.

- Draft a survey to evaluate partner satisfaction
- Meet with partners at a quarterly roundtable
- Welcome partners who exhibit at our Spring and Fall conferences
- Create new benefits to add value for partners

Contact: Nick Maningas nick.maningas@comcast.net or Kraig Null knull@wealthcaresolutions.com

Conferences and Education: Integrate our Life and Profession with Education and Inspiration.

- Suggest topics and speakers for educational programs
- Reach out to an author who has stimulated your professional thinking
- Review and critique a potential speakers' presentation in your area of expertise

Contact: Pete Gutekunst peter.gutekunst@raymondjames.com

Technology: Enhance our ability to communicate with our members and the public.

- Create a social media site for our members to connect
- Work on our website
- Help enhance the delivery of educational materials to our members

Contact: Erik Evans eevans@goalqueste.com

NexGen: Be part of the community of the next generation of financial planners

- Develop and promote programs to encourage professional enhancement

Contact: Rachel Fieweger Rachel@RTDfinancial.com

Finance: Help us use our resources wisely in providing member benefits.

- Provide advice on spending and budgeting for the association
- Analyze revenues and ways to enhance funding

Contact: Vince Barbera Vincent@newbridgewealth.com