Strong Close to 2014, Even Better 2015 On-Deck!

We wrapped up the 2014 Programs Season with two great CE programs November 12th at the Crowne Plaza in King of Prussia. Barry Yoder of ACE Private Risk Services, a chapter Gold Sponsor, delivered an interesting and eye opening presentation of the liability risks our clients face. Having assets can make individuals targets for lawsuits that would otherwise seem unlikely and, the planning process is an ideal way to call this risk to the attention of clients.

Paul Cieslik and Mick McCreesh from American Funds dug into Client Engagement Strategies to Elevate Your Practice. Knowing how our clients are invested and what allocations are most suitable is just the basic expectation of advisors. Getting to know and understand our clients and being able to deliver service with Credibility, Consistency and ultimately making a deeper Connection is what differentiates regular advisors from the Elite. Paul and Mick demonstrated how to identify what is unique to each of us and using that special difference to communicate our Credibility, Consistency and to Connect more deeply with our clients.

Looking ahead to 2015 we already have a number of great speakers on deck.

January 15 at the Conshohocken Marriott we'll welcome **Mitch Anthony** back to the stage who for years has been discussing with advisors the best ways to demonstrate value and build lasting connections with clients. Mitch is the author of Storytelling for Financial Advisors and the New Retirementality.

On March 26th, **Wade Pfau** will be with us to share the many sides of retirement income philosophies and challenge our ordinary "rules of thumb." Dr. Pfau, a professor at the American College, was a selectee for the *InvestmentNews* Power 20 for people expected to shape the financial advisory industry and also a recipient of *Financial Planning* magazine's Influencer Awards.

The Spring Symposium is set for May 5 at St. Joseph's University and our Keynote speaker will be **Steve Forbes** the two time candidate for the nomination of the Republican Party for president and an outspoken business leader on monetary and fiscal policies.

On June 9**, Kenn Tacchino** of Widener University and a contributor to the Retirement Income Certified Professional curriculum at the American College will be our presenter.

Please get the word out about our programs and encourage colleagues who haven't joined the FPA to come to a meeting and check us out…we really are the premier organization for financial planning!

Looking forward to seeing you at all our meetings this year and remember if you pay for all the quarterly meetings at the beginning of the year, there is an additional discount.

Happy Holidays and see you in January!