

A Pinnacle Award Level Chapter
Recipient of FPA National's Highest
Level Award for 11 Consecutive Years!
Volume 13, No. 2, February, 2012
Web address: www.fpanca.org



President's Message

Rita Cheng, CFP®

Dear Colleagues,

FPA is the community that fosters the value of financial planning and advances the practice and profession of financial planning. We are an open financial planning community who welcomes all professionals from diverse backgrounds and business models.

I would like to extend a special welcome to new members and new sponsors/partners of FPA NCA. Our new members expand our membership so that we can learn, grow, flourish and contribute to society. The financial commitment and support of our sponsors/partners contribute to our chapter's success by helping us deliver high quality programs to our members.

Thank you to Christine Parker, CFP®, Chair of the 2011 Board and the January Symposium Committee for an outstanding program to help financial professionals address the complex legal, financial, housing and health needs of affluent clients.

I encourage everyone to stay engaged with the financial planning community by attending our upcoming events.

If you are available on February 11, I urge you to volunteer for our first big pro bono event. The Financial Planning Association (FPA) and the National Association for the Advancement of Colored People (NAACP) have joined forces to provide financial education and services to the underserved and those most in need at the New NAACP Financial Freedom Center in Washington, DC. Please contact Tacy Paul Roby for further details. Her contact info can be found in this Newsletter.

On February 16, 2012 at Bethesda Country Club, we have a Media Savvy Workshop. In this presentation, former FINRA VP of Media Relations and now independent communications consultant Herb Perone, will explain how today's overcrowded media landscape produces "information pollution" and will help participants devise strategies for effectively getting their messages through the fog and to their desired audiences. Remember that Media Training is required to be a member of our Media Response Team. In 2011, our chapter received more than 500 media inquiries and speaker requests.

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After our Media Savvy Workshop, we hope that you will join us for our Luncheon Program. The featured speaker will be Steve Slifer of NumberNomics, an economist and public speaker in Charleston, SC who makes economics fun and understandable for everyone. The topic will be the “2012 Economic Outlook”. In this highly volatile and uncertain economic environment, you won’t want to miss his timely and informative presentation.

You may find additional details about these programs in this Newsletter.

If there is a particular topic or speaker that you would like to hear at our chapter, please forward an email to either myself marguerita.m.cheng@ampf.com or to Peggy Nelson at PeggyNelson8@verizon.net.

Stay engaged. See you on FPA Connect. Please visit <http://connect.fpanet.org/Home/> to “get connected”.

Please encourage your friends and colleagues to participate in our chapter so that they can benefit from our exceptional programs. Finally, let us know how we can enhance your FPA NCA membership experience.

Respectfully,

Rita Cheng, CFP®

2012 President, FPA of the National Capital Area Chapter

UPCOMING FPA NATIONAL CAPITAL AREA PROGRAMS

Please see Program details in this Newsletter!

February 11, 2012 – Pro Bono Event at NAACP Financial Center in Washington, DC

February 16, 2012 – Media Training – Bethesda Country Club, Bethesda, MD

February 16, 2012 – Member Luncheon – Bethesda Country Club, Bethesda, MD

March 15, 2012 – Professional Development Program – Maggiano’s Restaurant, McLean, VA

May 3, 2012 – Charity Golf Event – Reston National Golf Course, Reston, VA

Please register for these programs on-line at www.fpanca.org. More details and events to be posted soon! Please check our web site for complete details on our events!



We need you!

Our membership committee needs people willing to make a few phone calls each month to current members. This is a great opportunity to connect with other members of FPA without a huge time commitment. Please contact Helen Modly (hmodly@focus-wealth.com) and Volunteer!

SAVE THE DATE!

ANNUAL CHARITY GOLF CLASSIC

MAY 3, 2012

RESTON NATIONAL GOLF COURSE

REGISTER ON LINE FOR FOURSOMES AND SPONSORS NOW!

WE SOLD OUT LAST YEAR! DON'T BE LEFT OUT THIS YEAR!!

INTERNSHIP WHITEPAPER PUBLISHED BY JON YANKEE

Following our previous Career Development Programs, Jon Yankee has completed his whitepaper on Implementing Internships. An article will be published in the October *Financial Planning Magazine*. To read this article, please follow this link: <http://bit.ly/r2hfxZ>

Jon has offered this article as a resource to our chapter. This article link is also posted on our web site, and will be distributed through other outlets, as well. Thank you, Jon, for sharing this resource!

Volunteer Your Skills on Saturday, February 11 at the New NAACP Financial Freedom Center in Washington, DC

The Financial Planning Association (FPA) and the National Association for the Advancement of Colored People (NAACP) have joined forces to provide financial education and services to the underserved and those most in need. Our chapter has been asked to provide a few volunteers to:

- conduct a financial planning educational seminar; and/or
- private financial planning counseling sessions with couples

on Saturday, February 11, 2012 from 10 a.m. to 4 p.m. at the [NAACP Financial Freedom Center](#) at 1816 12th Street NW, Washington DC, 20009.

- The one-on-one planners can volunteer to stay the entire day or shifts of volunteers can be created, depending on the schedules of volunteers. The NAACP estimates that 50 members of the public will attend.
- If you have not already done so, you must complete the Pro Bono Boot Camp training session and sign the FPA's pro bono letter of engagement to volunteer. If you have volunteered at a Financial Planning Day in 2010 or 2011, you have completed the on-line Pro Bono Boot Camp training session. There will be copies of pro bono letter of engagement for you to sign at the event.
- The Pro Bono Boot Camp Training can be obtained here: mms://media.fpanet.org/VLC/81810_FPDProBono.wmv
- Please see the Boot Camp [Instructions](#) if you encounter a problem.
- Please review the Pro Bono Letter of [Engagement](#) that you will be asked to sign.
- Please review the Pro Bono [Eligibility](#) Policy for Volunteers.

Please contact the FPA National Pro Bono representative to volunteer for this event: Ryanne Enyeart, Ryanne.Enyeart@FPAnet.org

As background, the NAACP, in conjunction with several partner organizations, launched the Financial Freedom Center in 2011 to influence change in the banking industry, prevent unfair mortgage lending practices, protect the community against predatory mortgage lending practices, improve fair credit access, and promote sustainable homeownership, financial education and wealth building strategies in disadvantaged communities.

Based on a competitive RFP process, NAACP selected 21 of their local units to launch Financial Freedom Center Satellite programs in communities throughout the country. NAACP has invited our FPA chapter to help in Washington, D.C.

[Learn more](#) about the national FPA's new relationship with NAACP.

Thanks very much for considering this important way to volunteer your services to those in need and to generally help educate folks on the benefits of financial planning. Please contact Tacy Paul Roby, Co-Chair, Pro Bono Committee, FPA-National Capital Area at Tacy.Paul.Roby@Calvert.com or 301-951-4837 if you have any questions or to provide feedback about the event.

Check in - 8:30AM

Media Savvy Workshop

Thursday, February 16, 2011

Bethesda Country Club, Bethesda, MD

Remember that you must attend this workshop to be a member of the 2012 Media Response team. Our team received over 500 press and speaker requests in 2010 and 2011!

Conducted by former FINRA VP of Media Relations and now independent communications consultant Herb Perone, this media training workshop will look at how today's overcrowded media landscape produces "information pollution" and will help participants devise strategies for effectively getting their messages through the fog and to their desired audiences. Perone will also present valuable tips for dealing with reporters. In addition, the session will include a review of case studies of notable media/public relations blunders and mock interviews with several attendees.

Herb Perone is a veteran communications professional with a proven track record of handling crisis communications, managing complex issues and delivering in high-pressure environments. His wide range of experience includes a career in broadcast and print journalism as well as more than a decade in public relations/public affairs.

Perone's post-journalism focus has been in the financial services and regulatory arenas. Before establishing his own practice - Perone Communications & Consulting - in 2010, he served as Acting Director of the Office of Public Affairs at the Securities and Exchange Commission (SEC), Associate Vice President for Media Relations at the Financial Industry Regulatory Authority (FINRA) and Director of Media Relations and External Communications for the American Council of Life Insurers (ACLI). Perone was a key spokesman for the life insurance industry in the aftermath of the 9-11 terrorist attacks, handled SEC media relations during the Enron and Global Analyst conflicts and the resulting Sarbanes-Oxley reforms, and handled FINRA media relations during the Bernie Madoff scandal.

As a journalist, Perone was a producer and writer for ABC News and CNN. Earlier in his career he was a reporter for several newspapers in the Washington, DC suburbs and in Western Maryland. He has freelanced for the *Associated Press*, *New York Times*, *Washington Post* and other major publications and has written and produced programming for PBS, the Discovery Channel, Animal Planet and ESPN.



The 2012 Economic Outlook With Luncheon Speaker Stephen Slifer of NumberNomics

One CFP and One MD and One VA Insurance Pending!



The featured speaker will be Stephen Slifer from NumberNomics, and the topic will be the “2012 Economic Outlook”. In this highly volatile and uncertain economic environment this topic is both timely and informative. According to Mr. Slifer the economy appears to be on the verge of reversing some of those headwinds that have been holding it back -- the lack of job creation, the high unemployment rate, and the steady drag from housing. Nevertheless, the continuing debt woes from Europe, and our own struggles with bloated budget deficits and debt, may keep a lid on growth as we move throughout 2012.

So how fast will the economy expand in 2012? When might inflation become a problem? When might the Fed begin to tighten? When might the next recession begin? Mr. Slifer will share with us his insight on these issues. Mr. Slifer is experienced in presenting economic ideas in terms that people can understand. Additionally, Mr. Slifer’s background provides him with an in-depth understanding of what would be of value to financial advisors, fund managers, financial institutions, investors, and corporations.

To take advantage of the opportunities created by today's volatile markets, join us on February 16, 2012 for this high-impact presentation.

Profile of Stephen Slifer

From 1980 until his retirement in 2003, Mr. Slifer was the Chief U.S. Economist for Lehman Brothers in New York City. In that role he directed the firm's U.S. economics group and was responsible for the firm's forecasts and analysis of the U.S. economy. Prior to that he spent a decade as a senior economist at the Board of Governors of the Federal Reserve in Washington, D.C., forecasting growth in the money supply.

Mr. Slifer has written two books about the various economic indicators and how they can be used to forecast economic activity. He also writes a regular bi-weekly economics column for the *Charleston Regional Business Journal*. Mr. Slifer has been widely quoted in the press and on television. Slifer was voted the top economist by *Institutional Investor* magazine five years in a row and in 1997 was named as one of the top 100 "Faces to Watch in the Next Millennium."

March 15, 2012 Professional Development Program
Maggiano's Restaurant, McLean, VA
Check in – 10AM - Speakers begin at 10:30AM - Program ends by 1:30PM

First Speaker: Barry Glassman, CFP - What Got Us Here Won't Take Us There

As advisors, the only certainty we have is that our industry will change at an increasingly fast pace. How we practice, communicate and invest for clients must constantly evolve if we are to succeed and do right by our clients.

Join Barry Glassman, CFP, president of [Glassman Wealth Services](#) and former President of the Financial Planning Association's National Capital Chapter as he shares how he believes the next ten years will evolve, and what we, as advisors, can do to be prepared. His presentations to our chapter are always insightful and entertaining, and this one should be no different.

Barry is a contributing writer for Forbes.com and Investment News, and appears regularly on CNBC. A huge proponent of social media, Barry creates visually stimulating infographics to help explain complicated financial information and shares them with his growing online community that includes the media, colleagues and clients. He continues to be a leader and innovator, and has been honored with just about every Top advisor award from the financial planning industry including Barron's, Washingtonian, Reuters, Investment News, and Institutional Investor.

Barry strongly believes in supporting the community inside and outside of the profession. He is an active mentor for the Virginia Tech financial planning program and proudly sponsors students to attend national financial planning conferences. He sits on the national board of the National Brain Tumor Society, the largest organization of its kind in the US, and is an active board member of the Starlight Children's Foundation. To take his philanthropic efforts further, he matches his employees' charitable contributions, and offers unlimited vacation days for volunteer work.

Second Speaker: Dennis Moseley-Williams – How to Become Your Client's Personal CFO

How to become your clients' Personal CFO By shifting their emphasis from products and returns to services and information, advisors will increase their average account size and generate a steady stream of high-quality referrals. Dennis Moseley-Williams covers topics such as identifying top advocates among your client base, turning clients into advocates, and clarifying the referral process to ensure successful introductions. CREDIT HOURS: CIMA (1), CPE (1) – Only CIMA and CPA CPE available.

Mr. Moseley-Williams is an internationally known consultant in the financial services industry, with expertise in practice management, business development, and marketing. Since 1995, he has helped entrepreneurs create sustainable, predictable, and duplicable businesses based on marketing and communications best practices.

Mr. Moseley-Williams is founder of Dennis Moseley-Williams Strategic Consulting, an innovative, full-service marketing and communications agency helping organizations reach, connect with, and build sustainable positive relationships with their desired communities through the integrated application of effective communications strategies and best business practices. Mr. Moseley-Williams works closely with clients to develop customized solutions that drive results, increase revenues, produce long-lasting client relationships, and build businesses based on skill, knowledge, and personal service. His approach, described as "Human-Driven Marketing", is proven to help attract clients and build lasting businesses.

Mr. Moseley-Williams also speaks to Fortune 500 companies at national conferences and works on retainer with individual clients and firms. He is a recognized expert in the areas of increasing sales, managing and leveraging client relationships, and building sustainable businesses. Mr. Moseley-Williams is a member of the Putnam Business Advisory Group, Putnam's national speaking bureau.

**WE WELCOME NEW MEMBERS
WHO JOINED FPA NCA IN DECEMBER 2011**

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**WE WELCOME NEW MEMBERS
WHO JOINED FPA NCA IN DECEMBER 2011**

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**TAXATION INTERVIEW PROGRAM
Interview & Hire Graduate Tax Students**

Georgetown University Law Center is again partnering with New York University School of Law to sponsor this year's Taxation Interview Program (TIP). TIP enables private and public sector employers to interview, on one day (**March 2, 2012**) and in one place (**Embassy Suites Hotel, Washington, D.C.**), current LL.M. in Taxation students from Georgetown Law and NYU Law. Since 2001, TIP has been the nation's flagship program for the recruitment of graduate tax students, featuring employer schedules representing law firms, government agencies, corporations and the major accounting firms from around the country. Employers can pre-screen candidates for interviews, and they can also participate in TIP through a resume collection option.

Georgetown Law cordially invites you and your organization to participate in TIP 2012. If you are not involved in hiring at your organization, please feel free to pass this message along. For further information about TIP, please visit the [TIP website](http://www.law.georgetown.edu/graduate/TIP.html). **Employer registration is available online and will remain open until January 27, 2012.**

TIP website: <http://www.law.georgetown.edu/graduate/TIP.html>

Announcing a New FPA NCA Member Benefit...

Get Published in the FPA NCA Monthly E-Newsletter

Effective this month, the Financial Planning Association, National Capital Area (FPA NCA) welcomes original, advanced papers on any aspect of financial planning, whether research-based or conceptual in nature. For an article to qualify for submission the author must be an FPA NCA member. Members are limited to one published article per year. For more information on submission procedures please see [Author Guidelines](#). (FPA NCA Sponsor Partners may also submit articles for our Newsletter, to be reviewed under Sponsorship Guidelines.)

The FPA NCA understands that many financial professionals are seeking new ways to communicate to others their financial planning expertise. These financial planning experts are often gifted with unique insights that they want to share with others. Publishing in the *Financial Planning Association, National Capital Area Monthly E-Newsletter* provides an important outlet for FPA NCA members who want to hone their messages and make their organizations stand out from the crowd.

If you have any questions or comments about submitting your article, please do not hesitate to contact Kathleen Sindell, Ph.D. at 703-299-1700 or send e-mail to ksindell@gcsr.com.

Financial Planning Association, National Capital Area (FPA NCA) Author Submission Guidelines for Monthly Newsletter

A New Member Benefit -Get Published!

The Financial Planning Association, National Capital Area (FPA NCA) welcomes original, advanced papers on any aspect of financial planning, whether research-based or conceptual in nature. For an article to qualify for submission the author must be an FPA NCA member. Members are limited to one published article per year. Article submission guidelines follow and are based on the FPA National Web site procedures located at www.fpanet.org. (FPA NCA Sponsor Partners may also submit articles for our Newsletter, to be reviewed under Sponsorship Guidelines.)

Composition Approach

Audience

Keep our readers—primarily experienced financial planning professionals—in mind as you write. Provide timely, practical material that applies to, or will directly benefit, financial planners in their work. Take into account that your article is not an advertisement for your firm or services. Assume the reader has a fundamental but not esoteric knowledge of the financial services industry.

Style

Your writing style should be easy to read and follow, yet professional. Thoughts and concepts should be clearly presented and easy to comprehend. Examples that illustrate key points are encouraged.

Organization

Stay focused on guiding the reader through the paper. State early its purpose, the material it will cover, and why that material is important and useful to the reader. Clearly summarize the paper's premise and key findings or recommendations.

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Objectivity

Content should be objective and avoid mentioning or promoting specific financial products or services. Any statements or assertions should be supported by sufficient research and data.

Research

Academic research in financial planning should have a direct and demonstrable application or benefit for financial planners. All research should be readily accessible by editorial staff, review board members and readers.

Length

Manuscripts should run approximately 5,000 words.

Format

Your name, mailing address, e-mail address, phone number, and a brief biography should be on the cover page. For blind-review purposes, the second page should consist of the title and an executive summary of no more than 250 words, but not your name.

Executive Summary

The executive summary, ideally in a bulleted list, should tell readers what they can expect from reading your paper, including all major points and broad conclusions. Do not attempt to sell the reader on the merits of the article. Include information such as whether your article is a primer, for the experienced planner, or for planners at any level and highlight any specific opportunities for practical application of your data.

Infographics

Infographics—tables, drawings, graphs, charts, or other visual support material—should not be excessive in length or in number.

Endnotes/References

The FPA NCA uses an author/date system. While there are too many variations based on the variety of sources to cover here, these are our basic formats for articles and books:

- **Articles:** Last Name, First Name [subsequent authors are First Name, Last Name]. Year. "Article Title." Publication Title 1 [volume], 2 [issue] (Month or Season, if available): 22–32 [page numbers].
- **Books:** Last Name, First Name [subsequent authors are First Name, Last Name]. Year. Book Title. 4th ed. City: Publisher.

Screening & Review

Initial Screening

The Communications Committee first screens manuscripts for appropriateness and quality, and may suggest revisions before sending a manuscript for blind peer review. Authors are notified of the editorial staff's decision.

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Peer Review

Articles with merit will be reviewed by the FPA NCA Communications Committee. The initial screening and peer-review process takes six to eight weeks. You will be notified as soon as we have heard from all of our reviewers.

Once we have received all manuscript reviews, you will receive a letter notifying you of next steps—publish, revise, reject—for your manuscript, along with copies of the reviewers' evaluations.

While your manuscript is in the review process, we ask that you do not submit it to any other publication for consideration. The FPA NCA will not publish any articles that have been accepted or printed by other publications.

Submissions

Electronic

Send your completed manuscript or article ideas, preferably as a Microsoft Word file, to Kathleen Sindell at ksindell@gcsr.com or PeggyNelson8@verizon.net.

We acknowledge receipt of all content.

Payment

Authors receive no remuneration or reimbursement for any expenses incurred in conjunction with the preparation of articles published on the FPA National Capital Area Web site.

In Conclusion

If you have any questions or comments about please do not hesitate to contact Kathleen Sindell, Ph.D. at 703-299-1700 or send e-mail to ksindell@kathleensindell.com

**February – May 2012 Dates and Events Posted on Web Site Now!
More will be posted soon!**

**Remember to Bring your Quarterly Postcards to our Events
for a Chance to WIN a Cash Prize!**

2012 Quarterly Postcards will be sent soon!

MEMBER ADVANTAGE PROGRAM

You may be missing out on substantial savings that come with your FPA membership!

Your FPA membership includes discounts with several of FPA's discount participants. Get the most out of your FPA membership and **start saving today!** Take a look at some of the newest members in FPA's affinity program!

New! InFRE® Retirement Resource Center (IRRC)

Retirement planning is an integral part of financial planning and, as such, FPA has formed a strategic alliance with the International Foundation for Retirement Education (InFRE®) and the InFRE® Retirement Resource Center. The purpose of this alliance is to provide FPA members, many of whom are already Certified Financial Planner professionals, with discounted access to educational offerings that allow planners to further study the growing complexities of retirement planning, income and design.

SmartXpress Office Supplies

Forty thousand business products with discounts of up to 70 percent. SmartXpress is the Smart alternative to shopping retail. Orders over \$50 ship same day with free next-day delivery from 31 distribution centers. New customers receive an additional 25 percent off their first order of \$100 or more.

Markel Cambridge Alliance

The E&O program provided through Markel Cambridge Alliance for Registered Investment Advisers (RIA) and independent Investment Advisory Representatives (IAR) offers stability, quality of coverage and excellent customer service at a discount to FPA members. Markel Cambridge Alliance has been a long-term partner with FPA and has provided this coverage since 1988.

The College for Financial Planning

As a member of FPA, you have access to discounts on superior educational programs, one of which is through The College for Financial Planning.

The Dalton Review

Dalton Education provides FPA members significant discounts on their CFP® review programs. The Dalton Review® for the CFP® Certification Examination is the leading review provider in the country, with pass rates consistently 70-80 percent on the exam.

FedEx

FPA and FedEx are working together to bring you special FedEx discounts. Save up to 21 percent on select FedEx® shipping services and up to 15 percent on select FedEx OfficeSM services — no enrollment fees.

GEICO

Save up to eight percent off GEICO's already low rates with this new member benefit. Take advantage of your free rate quote today.

Identity Theft Protection Program

Every three seconds another identity is stolen. Protect your identity with LifeLock, the leader in identity theft protection. Get 30 days free and 10 percent off.

IPS AdvisorPro®

Created by advisers, for advisers, this award-winning Web-based system helps advisers build fully customized Investment Policy Statements (IPS) quickly and easily and is available through FPA's Member Advantage program. Current FPA members can take advantage of a discounted rate on their first year's subscription when you sign up at <http://www.ipsadvisorpro.com/>.

Kaplan College

As a member of FPA, you have access to discounts on superior educational programs, one of which is through Kaplan College.

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MEMBER ADVANTAGE PROGRAM – *Continued from previous page*

[Long-term Disability](#)

The new FPA group disability plan is 50 percent less expensive than individual policies with similar features and is available exclusively to FPA members. An up to \$6,000 per month tax-free benefit is available payable to age 65. The application process takes less than five minutes.

[+studentaid.com](#)

As a member of FPA, you can receive the [+studentaid.com College Cost & Planning Report™](#) for a special discounted price. The College Cost & Planning Report™ can strengthen your financial planning client relationships by helping them to make well-informed, affordable college choice decisions.

[Vacation Center](#)

Explore the world at discount prices and receive an exclusive FPA member discount at the FPA Member Advantage Vacation Center.

[Wireless Center](#)

Save time and money at the FPA Member Advantage Wireless Center. Compare and purchase plans and phones from all major carriers and brands.

[And more!](#)

Start saving on all of your office and personal needs today! It's already included in your membership; take advantage of the FPA Member Advantage Program!

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MEMBERSHIP HALL OF FAME - THANK YOU RENEWING MEMBERS!

We are proud to announce these FPA membership anniversaries
for December 2011 and 2012!

Five Year Members

Charles Donalies, Stephen Ellisor, Jessica Ness, Tracy Shen, Robert Taylor, Jerry Guido

Ten Year Members

Bryan Dowell, Mark Gripentrog, Dan Lash, Martin Hopkins, Mindy Gasthalter

Fifteen Year Members

Judy Redpath, Elizabeth Winstedt, Carolyn Meakem, James Smith, Ilene Brostrom

Calling All Coaches, Mentors, or Experienced Planners with a little time to share their Best Business Ideas!

FPA National has formulated a coaching program at the National level, and some of our FPA NCA chapter members have already registered for some coaching help. In addition, we have a chapter Mentoring Program, and we are in need of mentors there, as well.

We are searching for Experienced or Veteran Planners who will give a little time or council to new planners! In our community we have some new planners who are searching for coaching, mentoring, or business practice advice. Your time commitment can be small to just lend a hand or large to volunteer on our committee.....

Please respond to this message if you would be willing to help out a little in this regard. Please respond as soon as possible if you are able to help! Thank you for your support and for making a connection to others to help them gain your valuable expertise!

Mentorship Program

The FPA NCA will continue a Mentorship Program, and would like to encourage anyone interested in either being a mentor or wanting a mentor, to contact Jon Yankee at JPY@FJYFinancial.com. We are hoping that some of our more experienced members can help some of our new members with career and business guidance. For more information, please contact Jon. Thank you!

Calling All Planners who are looking for Best Business Practices

FPA NCA has reached out to our members for valuable coaches, mentors and experienced planners to share their wealth of knowledge on best business practices to fellow planners. We have had a very positive response from our members in this regard.

Now, we are looking for you if you are in need of some coaching, mentoring or guidance on best business practices. Your fellow planners have agreed to give a little time or council to our community planners! The time involved in these coaching or mentoring situations may be small or large, depending on the availability of the mentor, and depending on what you are looking for. Also, we would welcome your input and work to volunteer on our committee.....

Please respond to this message as soon as possible if you would like to be considered for a mentee spot or would be willing to help out our committee in other ways. Thank you for your support and for making a connection to others!



One Thing Leads to Another...Get involved and make a difference! If we all just did ONE THING, imagine the impact we can have on shaping our profession!

Here are SOME Things..... What will your ONE thing be?

FPA Committees that would welcome YOU....

Charity Golf Event: Have fun, while you network with your fellow professionals and raise money for the Foundation for Financial Planning.

- Join the Golf Committee and help plan the May event
- Seeks Sponsors to support this charity event
- Promote this event to members for participation
- Come and enjoy a great day on the course

Consumer Awareness: Elevate public awareness; promote financial literacy.

- Lead a basic investment workshop
- Work with the schools on a Junior Achievement Program
- Help Plan and Participate in Financial Planning Week at local events

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

- Help Organize a Financial Planning Day at the State level.
- Interact with legislators
- Attend a hearing on advisor regulatory issues
- Educate regulators of our services as a resource and counsel to the public

Member Communications: Sharpen your communication skills; engage members in FPA NCA events.

- Contribute an article to the newsletter
- Develop Announcements for chapter programs and events
- Develop new ideas for our chapter web site

Membership: Increase Chapter membership.

- Help plan a social event
- Distribute membership information at the meetings
- Make telephone calls to welcome new members
- Make telephone calls to encourage members to renew
- Help staff a CFP Exam luncheon for students
- Attend a free Member Breakfast to learn more about our chapter
- Survey Members to assess their satisfaction with our chapter

Partnerships: Create alliances with partners.

- Draft a survey to evaluate partner satisfaction
- Meet with partners in your office
- Welcome partners who exhibit at our programs

Pro Bono: A call to action... give the gift of education through large-scale initiatives.

- Assist military families
- Volunteer for CAAB financial literacy programs
- Help baby boomers plan for retirement in coordination with the DC Government
- Volunteer for HIP to counsel single mothers on home ownership
- Volunteer with the local school systems on financial literacy programs

Professional Development: Reach out to students, encourage new financial planning professionals, and assist senior advisors in keeping their skills sharp.

- Be the FPA NCA liaison to a local educational institution
- Help coordinate a study group for students, beginners or experienced professionals
- Assist in the planning of a Professional Development Program for our Chapter
- Be a Mentor and mentor one new planner for three months

Programming: Infinite Possibilities: Integrating our Life and Profession with Education and Inspiration.

- Suggest topics and speakers for educational programs
- Help Build the Spring Symposium with our Sponsor Partners
- Review and critique a potential speakers' presentation in your area of expertise
- Attend our educational programs on a regular basis
- Be a Buddy at Meetings to foster community building
- Invite a guest to a meeting to explore FPA

Public Relations: Enhance your visibility and be seen as a financial planning resource.

- Answer finance-related queries from the press
- Develop a relationship with your local newspaper editor
- Attend free training in working with television, radio and print media on February 11

Do 1 Thing.

One **Thing** Leads to Another.

Questions... Comments... How can I start my One Thing?

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