President's Message Newsletter: By: Marissa Beyer, CFP®

April 2019

IN THIS ISSUE

President's Message

Pro Bono Update

Advocacy Update

Fall Symposium Preview

NexGen Updates

Membership Update

CFA Events Promotion

Partner Messages

FPA NEO

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Advocacy: Kenneth Paull, CFP® Directors at Large:

2019 CALENDAR

May 16 Education Program

Topic #1 Exploring the Major **Changes Impacting Re-**

tirement Decisions for Ohio Anthony R. Podojil, Ph.D.

Days <u>July 16</u>

NexGen Annual Indians Game Outing September 19 Education Program

October 8 Fall Social October 24

View FPA National Calendar <u>here</u>

Education Program

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Happy Spring to all. The long awaited warmer, longer days are finally upon us. During the first few months of 2019, your FPA Northeast Ohio

Chapter has been hard at work with a goal of increasing membership and providing new and exciting programs. We are happy to share that attendance thus far has surpassed last year and the programs have brought back some long-time members to our monthly meetings. It has been great to reconnect with old friends as well as introduce new members to our enthusiastic group. The chapter has more in store for the second half of the year. Please take a moment to review our newslet-

ter to find out what we have planned. If you would like to get involved, please do not hesitate to reach out! **Pro Bono Update** By: Kimberly Murphy, CFP® In additional to our work providing pro bono financial planning to our

community we are looking forward to partnering with several local or-

ganizations to promote financial literacy throughout the year-stayed

sity and inclusion in the financial planning profession and financial ser-

tuned for more information coming soon. We are also participating in the University of Akron Diversitas event again this year-scheduled for Thursday, November 21. The mission of Diversitas is to improve diver-

vices industry through a forum that provides education and discussion about the need for diversity and inclusion in financial services to career influencers, career changers, students, and industry professionals. Through this program, the career influencers will improve support for their education and financial literacy programs, the students and career changers will have increased knowledge of the changing industry with its dynamic career opportunities, and the profession and the industry will see a greater diversity of professionals entering and retained in the industry. Please contact Kim Murphy, kmurphy@mcdonaldpartners.com if you are interested in volunteering. Annual Fall Symposium Preview—Save the Date By: Marissa Beyer, CFP®

Our annual symposium will take place on Thursday, October 24th at

Corporate College East. We are excited to announce that returning as a

keynote speaker will be industry expert, Michael Kitces. Michael will be giving two presentations and we are looking forward to his insight and

perspective as an important contributor to our industry. Our other keynote presenter will be Alex Dryden from J.P. Morgan Asset Management. Alex is the Executive Director on the Global Market strategy team at J.P. Morgan. As investment opportunities and the markets continue

to change, we are excited for Alex to share insights about where the markets are currently and the direction they are going. Keep an eye out for early bird registration in September. With the anticipation of Michael and Alex as keynotes, we expect our symposium to be a sell out this year. We hope to see you there! **Advocacy Update** By: Kenneth Paull, CFP® FPA Northeast Ohio is excited to participate in Ohio Advocacy Day

joining us to help build awareness of FPA with state legislators in Co lumbus, at our 2019 FPA of Ohio Advocacy Day on Wednesday, May 22nd! Let's show our elected officials that we can serve as a resource to them when it comes to financial issues and legislation, and also help

this year with FPA members from all across the state! Please consider

Director, Karen Nystrom. Webinar will be recorded for those who cannot attend the live session. Meet with your legislators' offices, and educating them on FPA's mission.

- training, badges and informational pieces to provide your elected officials. If you have any questions or would like to participate, please email
- NexGen Updates By: Robert Casarona, CFP® FPA NEO NexGen has had a great year so far! We kicked it off with a
- sional Panel Event on Owning Your Career" featured panelists Michelle Hirsch (Brunswick Companies), Rob Holub (Capital Advisors, LTD), Mike McGivney (Cohen & Company), Jacob Stoller (The Riverside Company) and took place in mid-March. This group of young, high-

achieving professionals answered questions about how they took their careers to the next level. Thank you to everyone that attended and

Keep a look out for invitations to our upcoming events, such as our annual Indians game outing this summer (Save the Date for August 1), an educational happy hour in the fall, and a volunteer event at the Cleveland Kids Book Bank in late November. As always, please don't hesi-

fleboard. Guests enjoyed networking amongst the group while playing a game of shuffleboard. Mark your calendars! Due to last year's popularity, our summer social event will be at Merwin's Wharf July 16th starting at 4:00. For this social you are encouraged to bring a spouse, significant other, or guest! Our fall social is scheduled for October 8th at 4:30 with a location TBD. Our last meeting before summer break will be on May 16th, so please

-Market" presented by Brett Hickey, Star Mountain Capital LLC Wednesday, May 29, 2019, 12:00 - 1:30 PM - REGISTER

ment Management

of charge. Use promo code "FPA19" when registering.

Wednesday, May 8, 2019, 12:00 - 1:30 PM - REGISTER

Networking, Cocktails, Appetizers, and Games at Backyard Bocce

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Heart Association.

"Expanding the Efficient Frontier by Capturing the Volatility Risk Premia (VRP)" presented by Sean Heron, CFA, Glenmede Invest-

 IRA gifting options including a program that mirrors the AHA's Donor Advised Fund (DAF) New Money Only Non-cash assets – anything that can be appraised and liquidated, we will consider

Elizabeth Scheiderer, CPP®

Daniel O'Brein, CFP® Secretary:

NexGen: Robert Casarona, CFP®

Kimberly Florcosky, CFP® Natasha Kalas, CFP®

REGISTER NOW!

Public Employees in

Topic #2 **Social Security Basics** for Public Employees Brandon P. Smith May 24 State of Ohio Advocacy Day

<u>June 5-6</u>

National Advocacy

Summer Social August 1

Fall SYMPOSIUM **November 19**

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build our relationships with those who make decisions that affect our profession, and our clients. What's involved? Being in Columbus for breakfast training on Wednesday, May 22nd. We will meet that morning at the café in the Sheraton Columbus Hotel at Capitol Square, across the street from the Ohio Statehouse to review materials and have a brief refresher training. Option to travel in the night before for a cocktail reception (possibly with legislators present) to meet them informally on Tuesday, May 21st. FPA NEO will sponsor one night's hotel stay for up to five (5) FPA members at the Sheraton. Participate in a training webinar (TBA) with FPA National Advocacy

• Participants will visit legislators in groups so no one is alone. Review material developed by FPA National with your legis-

lators and regulators for the day. FPA National will provide

kpaull@sequoia-financial.com by Friday, May 3rd. Registration is now open for our FPA DC Advocacy Day! The 6th Annu-

al FPA Advocacy Day will be held in Washington, D.C. from June 5-6.

Learn more and register today!

made both events successful.

competitive rounds of bocce ball. That event was followed by our first ever collaborative event with the YACG - Young Association for Corporate Growth. The event titled "Your Career Voyage: A Young Profes-

networking happy hour event at Pinstripes, where we played some very

tate to reach out if you would like to get more involved -BCasarona@ncafinancial.com. Membership Update By: Kristine Brill

We held our first social event of 2019 on March 12 at Forest City Shuf-

ested in attending. I'd be happy to reach out with an invitation. You can reach me at KBrill731@dollarbank.com. Attend CFA Society Cleveland Events for FREE! As part of our ongoing collaboration with CFA Society Cleveland, FPA Northeast Ohio members are invited to attend the following events free

"Measuring Risk & Trends in Private Credit and the U.S. Lower Middle

let me know of any prospective members that you think would be inter-

Thursday, June 6, 2019, 5:00 - 8:00 PM - REGISTER

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providing stability - especially during periods of economic or market stress. About Johnson Asset Management: With over \$3.2 billion in institutional assets under management, Johnson Asset Management is an indewirehouses, and independent broker dealers. For more information visit www.johnsonasset.com.

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