FPA FINANCIAL PLANNING ASSOCIATION
OF NORTHEAST OHIO

Newsletter: December 2019

happy holidays!

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Robert Casarona, CFP®

Pro Bono:
Kimberly Murphy, CFP®

Advocacy:
Kenneth Paull, CFP®

Directors at Large:
Kimberly Florcosky, CFP®
Natasha Kalas, CFP®

2020 CALENDAR

SAVE THESE DATES

Monthly Education Meetings:
January 16
February 20
March 19
April 16
May 21

2020 Symposium:
October 15

View FPA NEO Calendar Online here

View FPA National Calendar here

BECOME A PARTNER IN 2020! More information here.

THANK YOU TO ALL OUR 2019 PARTNERS!

Platinum Partner
Dollar Bank
Gold Partner
Charles Schwab
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American Advisors Group
American Heart Association
Amundi Pioneer Asset Management
Brunswick Companies
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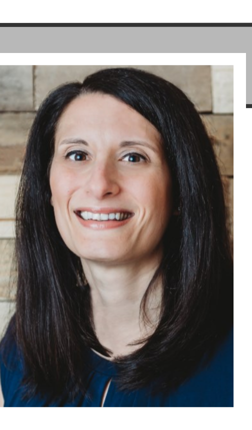
President's Message
By: Marissa Beyer, CFP®



As the end of 2019 draws near, I want to thank all of our members (those that have been part of our local chapter for years and those who recently joined) who attended an event this year. Whether it was a monthly meeting, one of our social events, or annual symposium, which was sold out and received very positive feedback, thank you for supporting our chapter and community which continues to grow and thrive— we have much to be grateful for this year.

I am happy to share that almost all board members will be returning in 2020 along with the addition of some new faces, ideas, and energy. Our goal is to continue the strong momentum we have into the new year. The focus will continue to be on providing timely and relevant programs during our monthly meetings with engaging and dynamic speakers. We also plan on increasing our efforts within pro bono and advocacy.

We are here as your advocates for our profession and your local chapter connection to FPA national. If we can help connect you with a member, partner, or professional affiliate please do not hesitate to reach out. We hope to see many of you at our first meeting on Thursday, January 16th.

We wish everyone a joyous holiday season.

Pro Bono Update
By: Kim Murphy, CFP®

Pro Bono services are a wonderful way for us to give back to our community. The need for these services is great and ranges from one-on-one financial planning advice, to those in need to teaching financial literacy, to school children. FPA of Northeast Ohio has partnered with Junior Achievement of Greater Cleveland to support them in their efforts to increase financial literacy in our local school children. There are many volunteer opportunities available in K-12 classrooms that can be customized to meet your busy schedule. In addition, the FPA of Northeast Ohio has partnered with The Foundation for Financial Planning and Family Reach to assist in their Financial Planning for Cancer Program. This program provides cancer patients and their caregivers with one-on-one financial planning and education to help mitigate the financial risks associated with treatment. Please contact Kim Murphy at 216-912-0560 or kmurphy@mcdonald-partners.com or Amanda Dureiko, Junior Achievement of Greater Cleveland 216-861-8084 or adureiko@jacleveland.org to learn more about these programs.

Advocacy Update
By: Ken Paull, CFP®

SAVE THE DATE: The 8th Annual FPA Ohio Advocacy Day will be May 13-14, 2020 in Columbus, OH. We are excited to announce some changes this year—keep an eye out as those plans finalize.

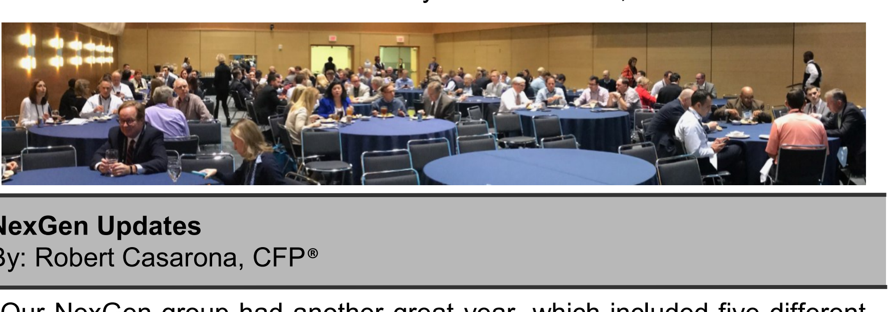
For information on attending FPA Ohio Advocacy Day in 2020 please contact Kenneth J. Paull, CFP® at kpaull@sequoia-financial.com.

2019 Annual Fall Symposium Wrap-Up
By: Alexander Rupert, CFP®

I am excited to report that our annual Fall Symposium was a great success this year! We had a full house and great content along with our valued partners! The Symposium took place in mid-October at Corporate College East with keynote speakers, Michael Kitces and David Lebovitz, providing some fantastic presentations. These presentations, along with the presentations from our breakout speakers, can be found on the meeting materials page on our website.

Congratulations once again to Bruce A. Jentner, CFP®, who was presented with the FPA NEO Lifetime Achievement Award 2019 during lunch at this years symposium!

Thank you to everyone who attended this year! We look forward to continuing to provide quality content that our members find valuable. Save the date for next year: October 15, 2020!



NexGen Updates
By: Robert Casarona, CFP®

Our NexGen group had another great year, which included five different events and saw over a hundred attendees. It was a year of events that encompassed everything from fun networking events, educational seminars, and community service. From an Indians Game to a Young Professionals Panel discussion at the Union Club, we really had a little of everything. Our most recent event was our annual community service event. This year it was held at the Cleveland Kids' Book Bank where we sorted books into boxes based on reading level, to be distributed to children that don't have access to books in the Greater Cleveland area. We volunteered at the Cleveland Kids' Book Bank because this is where our yearly speaker donation gift will be going for 2019. If you would like to get involved, or simply want to be added to the NexGen email list for next year please reach out to Bob Casarona-bcasarona@ncafinancial.com. Happy Holidays!

Membership Update
By: Kristine Brill

Our last FPA social of the year was on October 8th at Slyman's Tavern in Independence with around 35 registrations. Thank you to everyone who attended to engage in some great conversation and make the event a success! We are starting to work on next year's socials and will have dates and locations at the beginning of 2020. As always, if you know of any prospective members interested in attending an event or learning for about FPA, please email me (KBrill731@dollarbank.com) their contact information and I'd be happy to invite them as my guest to a future FPA meeting.

FPA FINANCIAL PLANNING ASSOCIATION

News and Events from FPA National

TAKE 5
DECEMBER 2019

Explore FPA's new Group Health Plan that will save you money!
The FPA Group Health Plan, created in partnership with Ryan Insurance Strategy Consultants (RISC), is available exclusively to FPA members and their employees, and is designed to meet your firm's health insurance needs while minimizing costs. Plans are available in most states for groups of 2-50, with rates approximately 25% lower than comparable ACA plans. Learn more here!

FPA celebrates the 50th anniversary of financial planning
Fifty-years ago, 13 financial service industry leaders met in Chicago to discuss the creation of the financial planning profession. In honor of this major milestone, FPA invites you to learn more about the historic event that launched the profession and our community leaders aspirations for the next 50 years. Watch this video that commemorates the 50th anniversary of the financial planning profession.

Registration is open for FPA Retreat 2020
Join us at FPA Retreat 2020 to engage with financial planning top thinkers, trailblazers, and change makers to ignite your passion and shape the future of the profession. The spirit of friendly discourse, a shared commitment to improvement and development, and a structure without formal boundaries promises to cultivate powerful interactions and connections between a group of planners at the top of their game. Register to attend FPA Retreat, May 4-7, 2020 at the Hyatt Regency Lost Pines Resort and Spa in Cedar Creek, Texas by Feb. 7 and save $200 on registration!

Invest in the future of the profession
As a financial planning professional, it's essential you're able to share your voice on issues that affect your business and your clients. The FPA Political Action Committee (FPA-PAC), a federally registered political action committee devoted to advancing the interests of the financial planning profession, can help you do just that. Learn more about the FPA-PAC and how you can help make a difference in elevating the profession that transforms lives through the power of financial planning.

Explore the latest issue of the FPA *Next Generation Planner*
In partnership with FP Transitions, FPA issued its November issue of *FPA Next Generation Planner*, an incredibly practical and ridiculously valuable monthly publication designed exclusively for those who are new to the financial planning profession. This edition features giving back with pro bono financial planning, highlights from the 2019 FPA Annual Conference, why planners leave the profession, and more. FPA members interested in receiving the monthly issues of the *FPA Next Generation Planner* can download the app on their Apple, Android or Windows devices.

Take the next step in your career with the FPA Job Board
FPA is committed to providing financial planners with resources that help them advance in their career journeys. With that goal in mind, the FPA Job Board was redesigned and re-engineered to make it more user-friendly and intuitive, while making it a more impactful tool for both employers and job seekers. While the primary focus is connecting employers with future employees and interns, the new platform also includes some exciting features, including resume writing, reference checking, and career coaching services (additional costs apply). Whether you are seeking the best talent in the profession or the next opportunity in your career, the FPA Job Board is here to help. Learn more about the FPA Job Board.

Messages from our Partners