



FINANCIAL  
PLANNING  
ASSOCIATION  
NORTHEAST OHIO

# FPA NEO NEWSLETTER

*News from the Financial Planning Association of Northeast Ohio*

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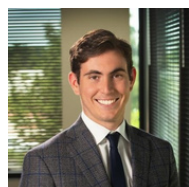
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## President's Message

by Bob Casarona, CFP®, MS, AWMA®



As we come to the end of another great year, I wanted to revisit some of the accomplishments we have achieved together as a community, while also looking forward to what will be another great year.

What a busy year 2023 was! We had six monthly meetings, supplemented by four summer webinars for a total of 15 hours of CE. We also had a great time at our chapter socials! Our NexGen community grew and thrived as well, with 5 independent events when young advisors were able to network and collaborate.

We also tried some new things. We held our first ever Career Path Panel discussion with members from different

size firms and from different roles. There were over 50 students and professionals in attendance. And perhaps the event of the year came at the All-Ohio Symposium in Columbus, bringing together 300 financial professionals from across the state for a rich exchange of ideas and insights. This event not only showcased our collective commitment to advancing the field but also emphasized the strength of our regional community.

As we look forward to next year, there were a few dates to keep at the front of your mind:

- January 18, 2024 - First monthly meeting
- September 18-20, 2024 - National FPA Conference coming to Columbus, Ohio!

In closing, on behalf of the entire Board, I would like to extend our gratitude to each member for their contributions and engagement this year. Our strong sense of community truly makes our chapter unique. I look forward to the opportunities that the coming year and am confident in it will be our best year yet.

Wishing you a very happy holiday season!

## Membership and Programming Update

by Kayla Stowe, CFP®, CRPC®



FPA had a great year in 2023 and we are looking forward to 2024! This year we have seen more and more of you back in person at our monthly education meetings and networking events.

We hope that you all enjoyed the array of topics covered at our monthly education meetings and that you found them to be engaging. The board is working on our 2024 educational calendar and many of those topics are listed below. Don't hesitate to let any of the board members know if there is something you'd like to learn more about at an upcoming meeting.

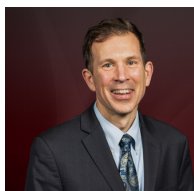
We also had some great socials this year! It was great to see everyone at Cooper's Hawk and at Merwin's Wharf for our annual summer event – where we were able to enjoy some beautiful weather along the Cuyahoga River. We also had a very successful joint event at Hofbräuhaus with FSP and NAIFA and look forward to additional joint social opportunities in the future. Keep an eye on your inbox for invitations to our upcoming socials in the new year.

As always, if you know of any prospective members, you'd like to invite to any of our events please let me know and I'll be happy to reach out with an invitation. You can reach me at [kstowe@nmswealthmanagement.com](mailto:kstowe@nmswealthmanagement.com). We look forward to seeing you in January!

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## Pro Bono Update

by Scott Brihn, CFP®



The CFP® Board has a convenient Pro Bono reporting tool available within the “My CFP® Certification” section of your CFP Board account. In 2022, 13,482 CFP® professionals reported participating in pro bono engagements. They represented an increase of 30% over 2021. Begin 2024 by attending [FPA's free 1hr Pro Bono Training Course](#) offered through Kaplan.

To find Pro Bono opportunities, please check out:

[www.probonoplannermatch.org](http://www.probonoplannermatch.org) – here you can browse numerous opportunities. One opportunity being highlighted right now is the Coordinated Assistance Network (CAN) and the Foundation for Financial Planning (FFP) are joining forces to provide financial coaching, advice and planning to Veterans and their families. The expected commitment is 3-hours monthly.

[www.3rddecade.org](http://www.3rddecade.org) – This well-organized program connects CFP® mentors with individual mentees. The 2-year engagements consist of 6-8 hours of support for each mentee. Most mentors take on between 1-5 mentees. 3rd decade schedules the appointments and provides all the infrastructure needed. Currently they are supporting 750+mentor/mentee relationships.

Please reach out to [scottb@pinnacleadvisors.com](mailto:scottb@pinnacleadvisors.com) to share other opportunities or ask questions.

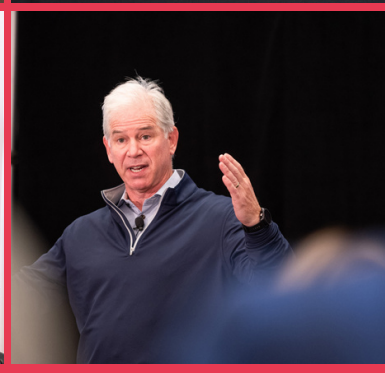
## 2024 Calendar - Details & Registration [HERE](#)

January 18, 2024 Education Program	“Growth Statistics and Advisor Benchmarking” “Anatomy of a Recession” 7:45-10:30 am Embassy Suites, Independence, OH
February 15, 2024 Education Program	“Behavioral Finance” 7:45-10:30 am Embassy Suites, Independence, OH
February 2024 Social	Date and Location TBD
March 21, 2024 Education Program	“Diversity, Ethics, and Inclusion” 7:45-10:30 am Embassy Suites, Independence, OH
April 18, 2024 Education Program	7:45-10:30 am Embassy Suites, Independence, OH
May 16, 2024 Education Program	“Investment Update” “Washington Legislative Update” 7:45-10:30 am TBD, Independence, OH
June 20, 2024 Summer Webinar 1	12:30-1:30 pm Zoom
July 2024 Social	Date and Location TBD
July 18, 2024 Summer Webinar 2	12:30-1:30 pm Zoom
August 15, 2024 Summer Webinar 3	12:30-1:30 pm Zoom
September 18-20, 2024 National FPA Annual Conference 2024	Columbus, OH
October 17, 2024 Education Program	7:45-10:30 am TBD, Independence, OH
November 7, 2023 Education Program	Date and Time TBD









## National Events and Activities

### FPA RETREAT 2024 | May 6-9, 2024

Energy. Change. Disruption.

FPA Retreat 2024 is the experience you need to get energized, explore innovation, and uncover disruption that is rocking your profession. Join us May 6-9 in Tucson, Arizona, at the Loews Ventana Canyon Resort for this unforgettable, one-of-a-kind event.

More information and registration [here](#).

### The FPA Marketplace: Savings on the Products and Services You Need

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### All FPA Publications Are Now Digital

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### TAKE 5 - Covering the latest happenings and news at FPA every month.

Read the latest [here](#).

## 2023 Board of Directors

Robert Casarona, CFP®, MS, AWMA®, *President*

Kayla Stowe, CFP®, CRPC®, *President Elect,*  
*Membership Director*

Kimberly Murphy, MBA, MS, CFP®, *Chair,*  
*Past President*

Kurt M. Thomas, CFP®, *Secretary*

Mark D. Van Drunen, CFP®, MS, *Treasurer*

Scott Brihn, *Pro Bono Director*

Zachary Gerber, *NexGen Director*

Lauren Lippert, CPA, CFP®, *Director*

Alexander Rupert, CFP®, *Director*

Elizabeth Scheiderer, CFP®, *Director*

Jacob Smail, CFP®, *Director*

*Happy  
Holidays*



DECEMBER 2023

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**ARE YOU INTERSTED IN BECOMING A PARTNER IN 2024?**  
Information can be found online [here](#).