



FINANCIAL
PLANNING
ASSOCIATION
NORTHEAST OHIO

FPA NEO NEWSLETTER

News from the Financial Planning Association of Northeast Ohio

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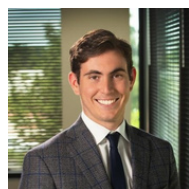
OUR PARTNERS

RECOVERY WITHIN REACH

2023 CALENDAR

President's Message

by Bob Casarona, CFP®, MS, AWMA®



I hope this message finds you well, enjoying the summer. As we enter the second half of the year, I wanted to take a moment to update you on the exciting events and activities planned for the rest of 2023.

- **All Ohio Symposium:** Registration is open! I am thrilled to announce our highly anticipated All Ohio conference will be held on October 9th and 10th at the Hilton Columbus at Polaris. We have a great lineup of speakers including, Andrew Fastow of Enron, Jeffery Levine, and Dr. David Kelly to name a few. Mark your calendars and reserve your spot today!
- **Summer Webinar Series:** In pursuit of providing more value to our members, this year we will be offering a series of online webinars this summer providing continuing education. The summer series will run throughout July and August. Additional information is below and more will be coming via email soon!
- **Monthly Meetings:** In addition to our Symposium and Summer Webinar Series, we also have two remaining monthly meetings in September and November. I hope to see everyone there.

I am truly excited about the upcoming events and activities and hope you are too. Your engagement and participation are what make our association thrive, and I look forward to seeing you at these events. As always, I welcome your feedback and suggestions to improve our offerings as we begin to plan for 2024.

I look forward to seeing you soon!

REGISTRATION OPEN!



JUNE 2023

FREE SUMMER WEBINAR SERIES

JULY - AUGUST 2023

THURSDAY, JULY 13, 2023

"TITLE"

Michelle Hirsch, Brunswick Companies

TUESDAY, JULY 25, 2023

"Where's the Finish Line"

Andrew Opdyke, First Trust

THURSDAY, AUGUST 10, 2023

Topic TBD

Steve Sweeney, Allianz

THURSDAY, AUGUST 31, 2023

"Top Thematic Positioning Ideas"

Ryan Issakainen, First Trust

REGISTER NOW >



12:30 - 1:30 pm ET

COMPLIMENTARY REGISTRATION

All courses will offer 1 CE for CFP, CPA

Membership and Programming Update

by Kayla Stowe, CFP®, CRPC®



FPA has been off to a great start in 2023! It has been so nice to see all your familiar faces (and some new ones too) at our monthly education meetings and networking events. It feels great to be back in person.

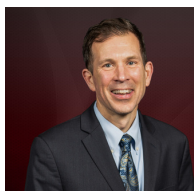
Our monthly Education Program included many insightful and interesting themes the first half of the year and we are always curious to hear if there are any specific topics that you'd like to see in upcoming programming. Don't hesitate to let any of the [board members](#) know if there is something you'd like to learn more about in an upcoming meeting.

We've had several social events already including a great joint event at Hofbräuhaus with FSP and NAIFA in April. [Register now](#) for our upcoming summer social on July 19 at Merwin's Wharf and additional events this fall.

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.

Pro Bono Update

by Scott Brihn



Successful pro bono engagements in the first half of 2023 included serving those who serve others via the [YWCA](#), imparting personal finance knowledge to young people through [Junior Achievement](#) and leading an adult personal finance class through the Stark County Library.

To further your understanding of how to provide pro bono services to underserved members of the community please check out the Pro Bono Financial Planning Training Course in the online FPA Learning Center. The course is free.

Potential future engagements we are learning about include the Financial Planning for Cancer Program which pairs cancer patients and their families with pro bono financial planners to help them manage cash flow and debt during cancer treatment. If you would like to discuss putting together a program to serve a specific population please contact me at sbrihn@gmail.com.

eliminating racism
empowering women
ywca



NexGen Update

by Zach Gerber



In May, FPA NEO NexGen participated in a joint event with Cleveland Professional 20/30 Club, Cleveland Metropolitan Bar Association, CFA Society Cleveland, and the Ohio Society of CPAs to hear a panel discussion about Innovation in Cleveland. It was a great evening of networking and education.

I hope to see many of you at the upcoming annual baseball outing where we'll see the Cleveland Guardians take on the Kansas City Royals on July 6, 2023 - more details below. We'll be purchasing standing room only tickets and will meet in "The Corner" at Progressive Field. It's a great view of the game and conversation is much easier when you're not in the same seat all night. [Register](#) today!

FPA NEO
NexGen
Outing

CLEVELAND GUARDIANS **VS** **KANSAS CITY ROYALS**

THURSDAY, JULY 6, 2023

PROGRESSIVE FIELD
2401 ONTARIO ST, CLEVELAND, OH 44115

MEMBERS: \$10
NON-MEMBERS: \$15
MUST REGISTER BY JUNE 30

FPA FINANCIAL PLANNING ASSOCIATION
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REGISTER NOW



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Recovery Within Reach Resources

by Andrea Seidt, Ohio Securities Commissioner, Ohio Department of Commerce
Andrea.Seidt@com.ohio.gov

Some of your clients may be struggling with addiction in their families and, unfortunately, not getting advice on how to find and pay for treatment. In some situations, it may be a client living with the disease, but in many other cases, it can be a client's child or other family member. In 2022, over 4,900 Ohioans died as the result of an unintentional substance overdose. It is the Department's goal to have 5,000 financial professionals complete its program by the end of 2023 - to train at least one new ally for every loved one lost last year. You can help us achieve that goal and help client families avoid costly errors in responding (and not responding soon enough) to addiction.

There are two easy steps that you can take to ensure that your team is properly educated about substance use disorder and potential client impacts.

COMPLETE THE DIVISION'S TRAINING

Online, self-study course approved for 2 hours of free CFP CE, available here: [The Ohio Professionals Guide to Servicing Clients and Families Dealing with Substance Use Disorder](#)

In-person, half-day live training approved for 3.5 hours of free CFP CE offered in four cities this year. I'm attaching the agenda for the first event in Columbus. Registration for all events is available here: [Recovery Within Reach: Resources for Financial Pros to Help Clients Find and Pay for Treatment](#)

- Columbus, Sonesta Columbus Downtown, 33 E. Nationwide Blvd., Columbus, OH 43215 (June 30)
- Toledo, Hilton Garden Inn Toledo Downtown, 101 N. Summit Street, Toledo, OH 43604 (August 10)
- Cincinnati, Graduate Cincinnati, 151 Goodman Drive, Cincinnati, OH 45219 (September 27)
- Cleveland, Cleveland Marriott East, 26300 Harvard Road, Warrensville Heights, OH 44122 (November 10)

VISIT THE DIVISION'S WEBISTE, RecoveryWithinReach.ohio.gov, to find helpful resources, including an interactive treatment map, on this topic.

I'm excited about what this training program can do for the profession in Ohio and for families struggling with addiction in Ohio communities. I hope that I can count on you and your team's partnership with the Division on this important initiative.

Remaining Events 2023 - Details & Registration [HERE](#)

July 6, 2023 NexGen Guardians Game	7:10 pm Progressive Field, Cleveland, OH
July 13, 2023 Webinar: "Divorce and P&C Insurance"	12:30-1:30 pm Zoom
July 19, 2023 Social	5:00 - 7:00 pm Merwin's Wharf, Cleveland, OH
July 25, 2023 Webinar: "Where's the Finish Line"	12:30-1:30 pm Zoom
August 10, 2023 Webinar	12:30-1:30 pm Zoom
August 31, 2023 Webinar: "Top Thematic Positioning Ideas"	12:30-1:30 pm Zoom
September 21, 2023 Education & Student Networking Event	5:00- 7:30 pm Independence, OH
September 27-29, 2023 National FPA Annual Conference 2023	Phoenix Convention Center Phoenix, Arizona
October 9-10, 2023 All Ohio Symposium	Hilton Polaris Columbus, OH
TBD October 2023 Social	Time and location TBD
November 9, 2023 Education Program	8:00-10:30 am Independence, OH

2023 Board of Directors

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