



FINANCIAL
PLANNING
ASSOCIATION
NORTHEAST OHIO

FPA NEO NEWSLETTER

News from the Financial Planning Association of Northeast Ohio

IN THIS ISSUE | MARCH 2023

JOINT PRESIDENT'S MESSAGE

MEMBERSHIP AND PROGRAMMING UPDATES

NEXGEN UPDATE

2023 BOARD

RECOVERY WITHIN REACH ADVISOR INFO

OUR PARTNERS

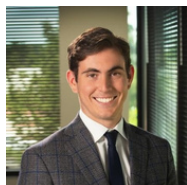
2023 CALENDAR

- 6 monthly meetings with ample CE opportunities
- Multiple social/networking events
- More ways and new opportunities to engage with financial planning students and young advisors

We are here as your local advocates to FPA National and to enrich your overall FPA experience. As such, please do not hesitate to reach out to us or any board members with feedback so that we can continue to reach that goal. We hope you enjoy these updates and look forward to seeing you at our upcoming events!

Joint President's Message

by Bob Casarona, CFP®, MS, AWMA®, 2023 President and Kimberly Murphy, MBA, MS, CFP®, 2022 President



We hope your 2023 has been off to a good start! Your FPA Northeast Ohio Chapter Board has been hard at work and we have some great things on the horizon. In pursuit to better communicate some of these upcoming initiatives with you, we have decided to bring back our quarterly Newsletter. This newsletter was suspended during Covid but with its resurrection, it is our we hope it will to drive further engagement and in so doing, create a better member experience.

A few highlights for the year to keep an eye out include:

- FPA All Ohio Symposium in Columbus will take place October 9-10, 2023 at the Hilton Polaris in Columbus, OH

Membership and Programming Updates

by Kayla Stowe, CFP®, CRPC®



FPA is excited to kick off another year of educational events and networking and we've got plenty of opportunities set for the year - **SAVE THE DATES!**

Our monthly Education Programs kicked off in January and we were excited to see everybody back in person as we begin to move away from our hybrid meetings for 2023. We hope everybody enjoyed the January and February programs and we look forward to seeing everybody at our monthly meetings on March 16th, April 20th, and May 18th before we break for summer.

We've got several social events planned for 2023! If you joined us earlier this week, we hope you enjoyed it! We'll also be planning our annual summer event at Merwin's Wharf in July and a September happy hour in the fall. In addition to our regular FPA events, we'll be having a joint social event on April 27th with FSP and NAIFA.

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.

We look forward to seeing you soon!



NexGen Update

by Zach Gerber



In addition to our normal schedule programming, we are excited to begin incorporating our John Carroll and Akron University chapters into our socials and networking events. NexGen hosted their first social at Pinstripes last week and had great member and student attendance. Keep an eye out for our annual summer Guardians game outing!. See you soon!

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*

Recovery Within Reach Advisors Information

Ohio Division of Securities Turns to Financial Planners and Advisors to Help Ohioans Recognize and Navigate Costs of Opioid Use Disorder

Financial planners and advisors are sometimes the first to see the financial red flags associated with addiction, yet they might not feel comfortable talking with their clients about such a serious, personal issue. The Ohio Department of Commerce's Division of Securities hopes to change that mindset with a first of its kind statewide campaign. [*Recovery Within Reach*](#), launched in August, gives financial professionals the resources they need to help families identify the financial signs of addiction and navigate the costs of treatment.

How You Can Help

The Financial Planning Association of Northeast Ohio encourages our members to support the Recovery Within Reach campaign. Please take a look at the campaign [*website*](#), particularly the [*section for advisers*](#) and the [*partner toolkit*](#). As a trusted adviser, you can use these resources to educate yourself about the financial warning signs of addiction, about treatment recovery options available in Ohio, and about ways to have these crucial conversations with your clients.

To receive email updates from Recovery Within Reach, sign up for their mailing list [*here*](#).

MARCH 2023

Thank you to our generous 2023 Partners!

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2023 Calendar - Details online [HERE](#)

January 19, 2023 Education Program	Independence, OH
February 16, 2023 Education Program	Independence, OH
March 1, 2023 NexGen Social	Pinstripes
March 7, 2023 Social	4:30-6:30pm Cooper's Hawk, Orange, OH
March 16, 2023 Education Program	8:00-10:30 am Embassy Suites, Independence, OH
April 20, 2023 Education Program	8:00-10:30 am Embassy Suites, Independence, OH
April 27, 2023 Joint Social with FPA, FSP, and NAIFA	Time TBD Hofbräuhaus, Cleveland, OH
May 18, 2023 Education Program	8:00-10:30 am Independence, OH
TBD July 2023 Social	Time TBD Merwin's Wharf, Cleveland, OH
TBD July or August 2023 NexGen Guardians Game	Time TBD Progressive Field, Cleveland, OH
TBD September 2023 Social	Time and location TBD
September 21, 2023 Education & Student Networking Event	5:00- 7:00 pm Independence, OH
October 9-10, 2023 All Ohio Symposium	Hilton Polaris Columbus, OH
November 16, 2023 Education Program	8:00-10:30 am Independence, OH