



FINANCIAL
PLANNING
ASSOCIATION
NORTHEAST OHIO

FPA NEO NEWSLETTER

News from the Financial Planning Association of Northeast Ohio

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President's Message

by Bob Casarona, CFP®, MS, AWMA®



I hope you are all having a productive 2024! The FPA Northeast Ohio Chapter Board has been hard at work creating a great schedule of events for the upcoming year and there are plenty of

exciting things to look forward to. A few highlights for the year include:

- FPA Annual Conference 2024 is coming to Columbus, Ohio! The conference will take place September 18-20, 2024 at the Greater Columbus Convention Center.
- 6 monthly meetings with ample CE opportunities
- Summer webinar series with additional CE opportunities (including Ethics)
- Multiple social/networking events
- Career Path Panel, providing the opportunity to engage with young professionals as well as financial planning students from John Carroll and the University of Akron

2024 Board of Directors

Kayla Stowe, CFP®, CRPC®, President

Lauren Lippert, CPA, CFP®, President Elect

Robert Casarona, CFP®, MS, AWMA®, Chair, Past President, Treasurer

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Scott Brihn, Pro Bono Director

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Mac McLaughlin, CFP®, Partnership Director

Kimberly Murphy, CFP®, Director

Jim Perrine, CFP®, Membership Director

Alexander Rupert, CFP®, Director

Jacob Smail, CFP®, NexGen Director

As always, the FPA Board is here to serve as your local advocate and to ensure that we are providing the most valuable and worthwhile experience for our chapter members. Please do not hesitate to reach out to any board members with feedback so that we can continue to provide enriching programming and valuable networking opportunities. We look forward to seeing you at our upcoming events!

MARCH 2024

Membership and Events Update

by Jim Perrine, CFP®



FPA is off to a good start to the 2024 year. Our Monthly Education Programs began in January and February, and we look forward to seeing everyone at our monthly meetings on March 21, April 18, and May 16.

We have a number of social events planned throughout 2024. If you joined us on February 27th at Cooper's Hawk, we hope you had a good time! Our summer social event will be at Merwin's Wharf in July, and an October happy hour in the fall. We will also be having a joint social event on April 24 with NAOFP and NAIFA. The location will be at the Wild Eagle in Broadview Heights.

We are excited to announce that we have the ability to auto renew your membership, which will provide you with a 10% discount. You can access the FPA auto renewal FAQs [here](#).

If you know of any prospective members you would 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 contact me at jim.perrine@mai.capital.

We look forward to seeing you throughout 2024!



Allianz Life Insurance Company of North America

The importance of risk management hasn't changed, but the solutions available to RIAs have.

→ Discover new risk management strategies built for RIAs.

Pro Bono Update

by Scott Brihn, CFP®



Looking to make a tangible impact through financial planning? We have a terrific opportunity to partner with The Legal Aid Society of Cleveland on an Eviction Diversion program. The pressing need is to conduct financial planning engagements before someone is evicted. We are being asked to participate in a Fall 2024 pilot program working with tenants from one or two private landlords.

Please reach out directly to scottb@pinnacleadvisors.com to learn more. I'm hoping we can support this initial effort with a minimum of 5 professionals from our chapter. The Legal Aid Society of Cleveland will help us all come up to speed on programs available to those at risk of eviction.

Keep in mind the CFP® Board has a convenient Pro Bono reporting tool available within the “My CFP® Certification” section of your CFP Board account. You can start your Pro Bono effort by attending [FPA’s free 1hr Pro Bono Training Course](#) offered through Kaplan.

NexGen Update

by Jake Smail CFP®



NexGen has an exciting year planned! We'll kick things off with a great networking opportunity at the joint social on April 24. Then this summer we'll come together for the annual Guardians Game outing. We are planning to bring back a panel presentation to learn more about the industry. And we'll wrap the year with a volunteer opportunity.

I'm happy to share that FPA of Northeast Ohio will be giving out two scholarships to attend the [FPA NexGen Gathering in Phoenix, Arizona from August 20-22, 2024](#). The scholarship will cover the registration fee (valued at \$450). This event is PERFECT for those newer to the industry. If you are interested, please apply [HERE](#). If you know someone who would be a good candidate, please encourage them to apply. Current experience in a financial planning role is preferred, but not required.

If you have questions about the scholarship or NexGen, please email me at Jake@demmingfinancial.com.

**SAVE THE DATE
ALL-OHIO SYMPOSIUM
APRIL 28-29, 2025
COLUMBUS, OH**



MARCH 2024

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

March 21, 2024 Education Program	"12 IRA Mistakes: Help Your Clients Avoid Common and Costly IRA Pitfalls" and "Diversity, Ethics, and Inclusion" 7:45-10:30 am Embassy Suites, Independence, OH
April 18, 2024 Education Program	"Driving Better Portfolio Outcomes" "P&C Insurance Industry Update" 7:45-10:30 am Embassy Suites, Independence, OH
April 24, 2024 Joint Social	12:30-1:30 pm Wild Eagle Saloon, Broadview Heights, OH
May 16, 2024 Education Program	"Investment Update" and "Washington Legislative Update" 7:45-10:30 am Corporate College East, Warrensville Heights, OH
June 20, 2024 Summer Webinar 1	College Inside Track 12:30-1:30 pm Zoom
July 2024 Social	Date TBD Merwin's Wharf
July 18, 2024 Summer Webinar 2	Market Update 11:00am-12:00 pm Zoom
August 15, 2024 Summer Webinar 3	12:30-1:30 pm Zoom
TBD September 2024 Virtual Ethics	Exact Date and Time TBD
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

FPA NEO WEBSITE DID YOU KNOW?

Past Event Materials are available [HERE](#)

Post/View Job Opportunities and/or Resumes [HERE](#)

MARCH 2024

Thank you to our 2024 Partners!

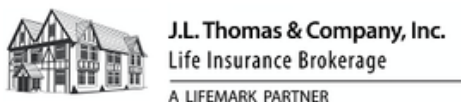
GOLD PARTNERS



SEEKING A BETTER WAY TO DIVERSIFY



SILVER PARTNERS



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



FINANCIAL
PLANNING
ASSOCIATION

Take 5

An update on the programs and services
that make FPA *your partner in planning*™



March 2024



Don't Forget to Register for FPA Retreat 2024!

Join us at [FPA Retreat 2024](#), taking place from May 6-9 at the breathtaking Loews Ventana Canyon Resort in Tucson, Arizona. Take part in an event designed to challenge your limits and ignite your business. If you seek a forward-thinking community, FPA Retreat 2024 is the must-attend event for you. Don't miss out on the chance to join us for this unforgettable experience in Tucson. [Reserve your spot now!](#)



Registration for FPA Annual Conference 2024 Is Open!

Are you eager to learn, grow, and take your business to new heights? If yes, you want to attend [FPA Annual Conference 2024](#). It's about connecting with like-minded people, learning from the best, and building a strong community. You will meet some of the brightest minds in the profession, share your ideas, and explore new strategies to achieve the next level. It's unique and custom-made for you, so don't let it pass you by. [Register now for early bird pricing and join us in Columbus from Sept. 18-20!](#)

Contribute Your Expertise By Sharing How You're Investing!

Share your expert thoughts on investing to help shape the content of the June issue of the *Journal of Financial Planning*. Conducted since 2006, the annual Trends in Investing Survey takes no more than seven minutes to complete. The results of this highly-anticipated research will reveal industry-shaping trends affecting you and your clients. [Take the survey today.](#)

The March *Journal of Financial Planning* Now Available

FPA Members can now read the March 2024 issue of the *Journal of Financial Planning* to learn about answering clients most taxing education questions, creating an excellent client experience, preparing young adults for financial independence at college, considerations for new planners, strategic networking, the benefits of behavioral nudges, working with widows, client segmentation, and much more. Access the latest issue of the [Journal now.](#)



Take 5

March 2024

Connect With Your Peers On the All-New FPA Connect!

Welcome to the next generation of connecting with your financial planning community! The all-new FPA Connect platform is your all-in-one source of connection with FPA members. The upgraded platform features a homepage with an activity feed to make following discussions easier than ever. The improved community library provides easier navigation to find what you want – when you want it. Knowledge Circles, the All-Member Open Forum and your different communities are better than ever. Access to the new FPA Connect is just another great benefit of FPA membership. [Check it out today!](#)

Elder Planning Specialist Program: Next Cohort Starts March 18

FPA and Plan4Life, LLC, are partnering to bring the [Elder Planning Specialist Program](#) to FPA members! This 12-week online program is designed to prepare serious financial planners to meet the needs of their older clients. Delivered in a cohort format, the program utilizes experts in several important fields to present meaningful video programs that cover such areas as legal planning, long-term care planning, end-of-life planning, and running a family meeting. The program qualifies for 10 CFP® CE credits and is available to FPA members for \$1,195 and nonmembers for \$1,495. Participants receive a certificate of completion showing their specialized elder planning training. [The next cohort begins March 18, so register soon!](#)

FPA PAC Shares End-of-Year Report for 2023

The [FPA Political Action Committee \(FPA PAC\)](#) is pleased to share a glimpse into its work over the past year, made possible by the unwavering support of FPA Members nationwide. In the FPA PAC 2023 Year-End Report, you'll learn about FPA PAC's focus, how it supports the financial planning profession, a new policy on PAC contributions to political campaigns, key metrics that matter, and more. You'll also learn about FPA PAC's top contributors and how you can help advance FPA PAC's mission in the year ahead. [Access the report.](#)



**Support the Advancement
of Your Profession**

The [FPA Political Action Committee \(FPA PAC\)](#), the only PAC focused on advancing the financial planning profession, provides an important seat at the table, forges relationships with lawmakers and their staffs, and provides an opportunity to share the financial planning story. There is much work to do and every dollar counts. To help us fight for your profession, we ask you to make a contribution to support your FPA PAC. Whether you contribute \$50 or \$5,000, every dollar is appreciated and will support advocacy efforts that move your profession forward.

DONATE TODAY!

