

Greater Cincinnati Financial Planning Association

April 2012 Newsletter - Issue #4, Volume 2

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Membership- Stephen Hester
ProBono- Chris Davis
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How about You?

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Our Mission Statement

The Financial Planning Association of Greater Cincinnati is the leadership and advocacy organization that connects those who need, support and deliver professional financial planning in Cincinnati, Dayton, and Northern Kentucky.

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#### April 24 – Dayton Member & Guest Breakfast

The FPA of Greater Cincinnati will be hosting the Dayton Breakfast from 7:30am to 9am at the Dayton Racquet Club in downtown Dayton. Greg Jones of Chartis Private Group – a national FPA sponsor- will be doing a customized presentation for our membership discussing the insurance needs and liabilities of high net worth clients. CFP and Ohio Insurance CE will be provided. Members and Guests welcome with RSVP to [admin@fpacinti.org](mailto:admin@fpacinti.org).

#### Membership Meeting – Rookwood Towers

Tuesday, May 8, 2012, 11am to 1pm at the Rookwood Tower. The planned topic will be the *Importance and Details of E&O insurance to the Success of your Financial Practice*. Ohio Insurance CE credit will be requested.

**Location-** Rookwood Towers, 3805 Edwards Road, Suite 700, (7th Floor), Cincinnati, OH 45209. Additional details on website.

#### Call to Service- Asking for Help

Through the FPA, you can volunteer to assist in projects that benefit the membership, profession, and the community. The Board has the following open positions that it seeks to be filled. Please contact Misty at [admin@fpacinti.org](mailto:admin@fpacinti.org) for info:

1. Government, Media, and Public Relations Director
2. Social Media and FPA Connect Coordinator
3. Director of Student Relations
4. Career Development Director
5. Junior Achievement Coordinator

### **ProBono: Covington Financial Education Day**

The FPA is planning to assist Brad Zapp of Legacy Financial Advisors of Covington in sponsoring a Financial Education Day in Covington Kentucky in the summer. Details being developed. If you would like to assist, please contact Misty at [admin@fpacinti.org](mailto:admin@fpacinti.org).

### **ProBono: Cincinnati Financial Education Day**

The January 28 **Cincinnati Financial Education Day** was a success. At the next Membership Meeting, I will have the certificates of appreciation and the mayor's appreciation letter for your efforts. We will soon also have an advertisement in the Cincy Magazine to further express the appreciation of the Mayor's office.

### **ProBono: Thank You for Helping with Compsych/ Kohls Benefit**

Thanks to those who volunteered to help with the Compsych/Kohls benefit event on the 19th and 20th of April. Many employees of Kohls had the opportunity to learn about the basics of managing their finances, the FPA was able to further strengthen our partnership with Compsych and local business leaders due to your help. Please email our offices if you are interested in volunteering for an upcoming event.

### **The Heart of Financial Planning – National Award**

*Nominate, Recognize Your Extraordinary Colleagues for this Prestigious Award  
Make it a goal in 2012 to do something extraordinary to win it in 2013.*

Individuals who do exceptional work in our community deserve to be recognized. That's why the FPA® wants you to nominate an individual or an organization that is doing *extraordinary* work in the financial planning community to receive the [2012 Heart of Financial Planning Award](#). The award honors individuals and organizations that have made the biggest difference for the financial planning community and/or the public while upholding and promoting [FPA's Core Values](#). The recipient will be recognized for their service at FPA Experience 2012, the organization's annual conference in San Antonio this fall. Nominate an FPA member, financial planning firm, FPA chapter, business person, professor, journalist, or any other organization or individual you believe has consistently performed outstanding work that contributes to the financial planning community and/or the public. What makes a nominee extraordinary? Nominees should demonstrate leadership, competence, integrity, relationships and stewardship. The deadline for nominations is **June 1, 2012**. [Download a nomination form](#) or submit a one- to three-page letter that includes:

- Detailed description of what sets your nominee apart and makes them rise to the top. Tell us what extraordinary work your nominee is doing – include specific examples.
- The nominee's actions that contribute to or give back to the financial planning community and/or the public.
- The nominee's excellence in demonstrating FPA's Core Values.
- Your affiliation with the nominee.

**Send your nomination letter via e-mail, mail or fax to:**

[Heart of Financial Planning Awards](#), Financial Planning Association

7535 E. Hampden Ave, Suite 600, Denver, Colorado 80231, Fax: 303.759.0749

## **Changes in FPA Membership Descriptions**

The National Financial Planning Association has created additional categories of membership to better identify the services provided by the members. The FPA individual membership categories will be:

- **CFP® Practitioner:** Individuals who hold the CFP® certification and publicly attest to their practice of financial planning.
- **Financial Advisor:** Financial services professionals who deliver personal financial advice, which may include the use of the financial planning process. CFP certificants who work in financial services but **do not** practice financial planning are eligible for the Financial Advisor category.
- **Allied Professional:** A professional in an allied discipline or business who works directly with financial planners to support their practices and delivery of financial planning services to the public. Examples of allied professionals would include attorneys, tax specialists, charitable giving specialists, business consultants and coaches, etc.
- **Academic:** An academic professional who teaches full-time in a CFP Board-registered program, certificate program or related finance/business degree program.
- **Financial Planning Student:** Enrolled in a CFP Board-registered program, certificate program or related finance/business degree program with the ultimate interest of pursuing a financial planning career.
- **International:** A financial planning professional who currently resides outside of the U.S.
- **Retired:** An individual who was a member of the *CFP Practitioner, Financial Advisor or Allied Professional* category, but who has now retired from his/her primary vocation.

Additional details at the national website- [www.fpanet.org](http://www.fpanet.org)

## **Cincy Magazine: Financial Planning Focus - October Publication**

Please remember that we will be publishing our membership roster in the Cincy Magazine October edition as part of the national Financial Planning efforts. We are beginning to seek advertisements, articles from members, and ideas for the theme and cover of the magazine insert. Please see details on our website regarding advertising costs. Send ideas to [www.fpacinti.org](http://www.fpacinti.org).

## **Financial Planning Ranked Among The "Best Jobs"**

Financial planning is expected to be one of the fastest-growing professions over the next decade as more baby boomers enter retirement. Planners enjoy above-average salaries, flexible working arrangements and support from membership organizations including

the Financial Planning Association. See article at [U.S. News & World Report](#). Remember that we offer a resume listing service to our members, located at <http://www.fpanet.org/Chapters/fpacinti/CareerDevelopment/JobPostings/>

### **A Privacy Checklist to Protect Your Firm and Your Clients**

Personal information is being shared constantly on the Internet, making it important for financial planners to take steps to protect firm and client privacy, writes RIA Independence President Ash Bhatnagar. He offers a risk assessment for planners, a list of items that planners should never collect from clients and a list of items that should not be transmitted through e-mail. [FPAnet.org/Practice Management Center blog](#)

### **Money Saving Idea for Clients - Couponing 101**

*April 26, 2012, 6pm - 8pm, College Hill Recreation Center, 5545 Belmont Ave, 45224*  
In celebration of April as Financial Literacy Month, Smart Money and the City of Cincinnati invites you to attend a unique and exciting workshop to learn how to save hundreds on your groceries and much more. *Clip and Save: Smart Couponing 101* will cover the art of couponing to save, save and save more. Participants will receive a couponing starter kit and additional tips on how to stretch a dollar. Join us at the College Hill Recreation Center on Thursday, April 26 from 6pm -8pm. To learn more, see the attached flyer. This workshop is FREE and for everyone, regardless of income, household structure or other demographic, so please share this with all of your contacts. The workshop is free and open to the public. Space is limited. RSVP today by calling 513-241-7266 ext. 114 by April 25.

### **Volunteers needed for World Choir Games, July 4-14, 2012**

International event for Cincinnati and the Ohio Valley region. Details about volunteer opportunities and ticket purchases are available at [www.2012worldchoirgames.com](http://www.2012worldchoirgames.com). The deadline for volunteer registration is Friday, May 25. This is the Olympics of Musical Arts & Entertainment and important to the economic development of the region.

### **Dinner Invitation to FPA Members**

Artio Global Investors will be visiting the Cincinnati area and would like FPA members to join us for a dinner featuring presentations by Patrick Maldari, CFA, Senior Portfolio Manager, Fixed Income and Tim Devlin, Portfolio Strategist, US Equities on Wednesday May 9<sup>th</sup> from 6:00-8:00 pm at Trio Bistro, 7565 Kenwood Road in Cincinnati.

Patrick will be reviewing the Fixed Income Market Outlook and Tim will be discussing Opportunities in US Investing. Please RSVP by May 2 to Laura Krassner [Laura.Krassner@artioglobal.com](mailto:Laura.Krassner@artioglobal.com) or 212-297-3944. Seating is limited. Let us know if you have any dietary restrictions.

## Remember our Chapter Sponsors

“Support Those- Who Support Us- Supporting You”



**BLACKROCK**



Remember that we offer white papers on a variety of topics on our website – constantly being updated, published by both sponsors and members

### The National FPA offers valuable Group Membership Discounts

As a reminder, the FPA offers valuable discounts to organizations that encourage multiple members. This is a great way to get all the educational and network benefits of the FPA for the Principals, Advisors, and staff of your company. FPA's Group Membership program gives you and your colleagues 15% off [individual membership](#) dues, the best pricing available on conferences and events, PLUS your firm enjoys unique [company benefits](#).

**Join FPA's  
Group Program  
and Receive...**

- 15% off individual membership dues
- Up to 20% off national FPA conference registrations
- Exclusive use of FPA's firm member logo
- Recognition at FPA Experience and online via FPA's [Group Member firm list](#)  
[View the full list of benefits and discounts](#)