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On July 1, 2012 the FPA of Greater Cincinnati became the **FPA of Southwestern Ohio**. We have changed our name to better reflect our service to the Cincinnati and Dayton region. We are here to help you grow your practice, share best practices, and foster the financial planning discipline in the region. We offer insightful customized educational opportunities, professional networking events, and organized community service activities to bolster the image of your practice and the industry. Please reference your FPA Membership in your advertising and encourage it among your peers. Logos can be displayed in marketing materials- please contact our office to get a quality version of the FPA logo and marketing collateral.

Our Mission Statement

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

Cincinnati Chapter Meeting

What Financial Planners Should Know About Social Security

TIME: 11:00 am – 1:00 pm
LOCATION: Rookwood Tower
3805 Edwards Rd. Suite 700 Cincinnati, OH 45209

If you do not understand the intricacies of Social Security, you need to attend this session. This is a great opportunity to learn directly from the expert on Staff at the Social Security Administration, Sue Denny. Clients need to plan effectively to use this government provided annuity program. Even if they are wealthy, clients want to maximize the benefit available from the annuity they earned throughout their lifetime. It is important that you understand their options, so that you can be the full service comprehensive sole trusted advisor to them and their beneficiaries.

Registration is full at this time. Please email admin@fpacinti.org to be placed on the waiting list.

July 9 Dayton Meeting was a success.

Andy Kennedy gave a great presentation about the purpose for Long-term Care Insurance. He reviewed the methods to sell it (Individual, Work-place Marketing, and Group Insurance) and the common features that are critical for the insurance to contain to protect the client. He also gave some great tips of how to inspire the sale. If you missed the meeting, hope that your competition did as well. By the way, the food from Brio was great as always. That Dayton Meeting was our last until 2014.

FPA Annual Planning Publication - Dec 2013

Once again, through [Cincy Magazine](#), the FPA of Southwestern Ohio will help advertise to the subscribers and the general public in the region the benefits of working with our membership to plan for their future. The December edition of Cincy Magazine will again contain our annual insert that will have articles of interest for the general public and a published list of our membership. Additional advertising space is available for purchase at discounted prices by members. The rate card will be published on our website. For more details, please contact admin@fpacinti.org. Members will receive printed copies for distribution as well. This year, the December issue will be the listing of the top 100 doctors in the region, a very popular edition, especially read by the medical community (popular target market).

FPA Social Event- Golf Outing – August 26

Are you interested in attending a golf outing with fellow FPA members at the Shaker Run Golf Club in Lebanon, Ohio on August 26 for a 1:30pm tee-off? Cost would be \$60.00/person for golf, cart, and Montgomery Inn sandwich dinner. It would be 18 holes (9 original and 9 Meadows). Please RSVP to admin@fpacinti.org to express your interest in the event. Follow-up email will then contain purchase instructions. Please feel free to invite colleagues and friends to the event as well.

Professional Education

2013 FPA Financial Symposium serving Cincinnati, Dayton, & Region.

The 2013 FPA Board is developing our [2013 Financial Symposium](#). This is the primary biennial education event that we offer to members and guests. The event will be focused on investment products, alternative investments, and personal insurance and their related strategies using the key factors of Financial Planning. Continuing Education credits, CFP Board Ethics, and Ohio Insurance Ethics programs will be offered. The event will be on Sept 26 from 8:00am to 5:00pm at Hondros College in West Chester, Ohio. Please mark your calendar, inform us if you plan to attend, invite colleagues, and check out our website as details are finalized and published. We will have a student and new Financial Planning Industry entrant's educational track as well. We will also have "Happy Networking Hour" at the Wingate after the Symposium. So, please plan some time to be social at the end of the day. See Agenda and announcement for details.

[Click here](#) to register!

Apply Now for FPA Diversity Scholarship to attend FPA Experience 2013

Submit your application now for an FPA Diversity Scholarship to attend FPA Experience 2013. Scholarship awards include 1-year FPA membership, admission to the conference (October 19-22), and some travel expenses. Criteria for applicants include:

- Raising awareness of the profession in diverse communities;
- Serving diverse communities with financial planning;
- Increasing professional opportunities for diverse communities within the profession.

[Apply now!](#) Applications are due September 13. No late entries accepted.

ProBono /Community Service

United Way offers a new way to volunteer to help the Community

Looking for a new volunteer challenge? We've made it easier than ever to volunteer with United Way Volunteer Connection. More volunteer opportunities. New search functions. And custom alerts based on your interests. [See what's new at United Way Volunteer Connection!](#)

The Pro Bono Planner of the Year is presented to a financial planner/advisor who has made a leadership contribution to a nonprofit organization by arranging for the group to receive dedicated professional financial services, including pro bono advice and financial life skills. The Team of the Year is presented to a group of financial planners/advisors (office, practice, chapter) for their involvement in providing pro bono advice and/or financial life skills activities to underserved populations in partnership with community-based organizations. Two awards are presented in each category - one winner and one honorable mention. The Foundation for Financial Planning will also present Grant awards to the non-profit organizations in which the winner and honorable mention are engaged to provide continued support of financial life skills outreach.

Remember- Community Service is great marketing and means of networking.

The Easter Seals of Cincinnati needs FPA Members help to serve Veterans

The Easter Seals of Cincinnati has received a large grant to put together a service platform for veterans. They want to partner with the FPA to bring advisors out to do seminars and one on one sessions with veterans who need assistance. The details are still being developed. Please contact admin@fpacinti.org to express your interest.

UC Career Fair Registration is Open

The University of Cincinnati would like to invite you to attend the **2013 Fall Career Fair**. This event is presented by the University of Cincinnati's Career Development Center, Division of Professional Practice and Experiential Learning, College of Engineering and Applied Science Tribunal and the Carl H. Lindner College of Business Student Action Team. The University of Cincinnati's 2013 Fall Career Fair Week will take place on Wednesday, September 25th to Friday, September 27th in the Campus Recreation Center on Main Campus. The **Diversity, Professional, and Creative Career Fair** presented by the Career Development Center and the Carl H. Lindner College of Business will be held on **Wednesday, September 25th from 10:00 AM to 4:00 PM**. You will be able to connect with students seeking internship, co-op and full time opportunities. This event is open to ALL students. The **Technical Career Fair** presented by the Engineering & Applied Science Tribunal will be held on **Thursday, September 26th from 10:00 AM to 4:00 PM**. You will be able to connect with students who are interested in internship, co-op and full time opportunities. This career fair is for engineering majors and technical majors from the Carl H. Lindner College of Business and College of Education, Criminal Justice and Human Services. On the last day of the Fall Career Fair Week, Friday, September 27th, there will be an opportunity for employers to interview students they have met at the career fair. To find out more on pricing information visit: <https://tribunal.uc.edu/careerfair/registration/pricing.php?ref=employers>.

To register for the Career Fair use the following link: <http://tribunal.uc.edu/careerfair>. Please click the link "Register Now." Once you have reached the login page click the link "Create Account" to begin the process of the Fall Career Fair registration. Please note that registration will close on Friday, September 13, 2013. If there are further questions please contact the Engineering and Applied Science Tribunal at

careerfair@uc.edu or Marissa Schoonover, Program Coordinator for the Career Development Center at schoonms@uc.edu. Feel free to also call the Engineering and Applied Science Tribunal Office at [\(513\) 556-5439](tel:(513)556-5439) or the Career Development Center at [\(513\) 556-0313](tel:(513)556-0313).

UC Appreciates the Help of the FPA-SWO

Appreciation letter from the President of UC:

On behalf of the University of Cincinnati, I want to personally thank you for being one of **more than 100,000 donors** who gave to UC through the billion-dollar *Proudly Cincinnati* Campaign. **You have helped UC make history again!** Your support has significantly advanced programs across our University while making even greater accomplishments possible for years to come.

Donors like you have funded hundreds of new scholarships, improved our campus, and provided support for renowned faculty to educate, inspire and pioneer innovation across numerous disciplines. These gifts underscore the pride our alumni have in their alma mater as well as the importance of our University to the City of Cincinnati and beyond.

I am truly humbled by your generosity and want to share my deep appreciation for the impact you have made at our great University. Please visit proudlycincinnati.org to view a special message from me to celebrate our latest achievement.

Thank you for being Proudly Cincinnati and for making UC the #HottestCollegeInAmerica!



Santa J. Ono
President, University of Cincinnati

National FPA / CFP Board Related

Keir offers a Scholarship for CFP Study Program

Keir will award one scholarship per FPA chapter per exam cycle. Student chapter members are also welcome and encouraged to apply. The winner may choose any Keir Instructor Led Live Class or Keir Virtual Review Class. The scholarship includes class tuition and Keir's Basic Review Package. This prize has a retail value of \$970. Class dates and locations are available on our website at www.KeirSuccess.com. Scholarships are awarded based on merit, with consideration given to career goals and any honors received. For additional information, please contact Keir's Director, Shannon Bryant, at sbryant@keirsuccess.com or by calling [800-795-5347, ext. 107](tel:800-795-5347).

Practice Management Idea of the Month

Keep Good Notes.

Your Compliance Manager may have been telling you for years - it is important that you keep good contemporaneous notes of your client meetings and conversations in case you need to deal with a client complaint or court action. Having notes and emails regarding what the client told you or what you told the client is very helpful to protecting your practice from expensive legal or professional malpractice related risks and costs. Remember that documents are discoverable for federal and state court purposes. Try to have in a format that is not alterable without a record of changes. Modern CRM systems and email archive systems are very helpful in this process.

Remember our Sponsors

"Support Those- Who Support Us- Supporting You"



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