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Plan for These Chapter Meeting Dates:

Cincinnati	Dayton
February 11, 2014	March 4, 2014
May 7, 2014	July 1, 2014
August 6, 2014	October 7, 2014
November 5, 2014	*webinars and networking dates will be released at a later date

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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.

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.

January 2014

FPA of Southwestern Ohio wins recognition as a FPA Bronze Chapter. Congratulations!

The 2014 FPASWO Board of Directors

2014 Board of Directors:

- Chairman– Nathan Duncan
- President-Walter Wilson
- ProBono- Chris Davis
- Membership- Henrietta Nye
- Sponsorship Director – Michael Armstrong
- Member at Large- Brian Summe
- Programs- Deanna Purvis
- Public Relations- Doug Kinsey

The 2013 Board of Directors met on December 13 for its 2014 Strategic Planning Meeting and on January 3 for its first board meeting of the year. The Board has voted to elect the above professionals and members in good standing as its 2014 Board of Directors. Congratulations. Please come to our February 11 meeting to meet them.

The first two sessions of our year will be focused on practice management topics. This customized curriculum is to help members prepare for greater success in 2014.

Chapter Meeting: February 11, 2014
Location: Rookwood Pavilion
Speaker: Jared Lockwood of Sandler Systems

[Click Here to Register!](#)

You've thought about improving the efficiency and profitability of your practice, but you don't know where to start. Join us as Jared Lockwood with Sandler Training presents a workshop that provides strategies members can implement immediately to get positive results for clients and your practice.



Dayton Meeting: March 4, Brio's at the Greene Hosted by Strategic Practice Management

Strategic Practice Management will be hosting our Dayton Chapter Meeting on March 4 at Brio's in Beavercreek. This will be an interactive practice management planning session that will give you the opportunity to think about your practice and to create a better business in 2014. As part of preparation, SPM has created a [Pulse Survey](#) for members to fill out so that the topics presented are customized to the needs of the audience. Please [register](#) for the event on the FPA website. To learn more about the services and expertise of Strategic Practice Management, please listen to their webinar entitled "[Stop Your Money Leaks](#)" available on our website.

FPA Annual Planning Publication

As of the writing of this newsletter, our themed publication, "Plan for Life", has gone to press and was distributed in December via the *Cincy Magazine* and will be in February via the *Dayton Magazine*. We are experimenting this year as we will encourage the public to both read the magazine and find additional articles on our website about topics of public interest. The Membership Directory will be only accessible through our website page. By doing this, we will be able to directly measure its success.

It is time for us to start planning the 2014 edition of the publication. The rate card is available on our website. The cost of the advertising space varies depending on size of ad, with ¼ page costing \$975, ½ page costing \$1675, and a full page \$2795. Northwestern Mutual and Western & Southern have already committed to the front and back cover. Growing your business requires a commitment to effective advertising, and Cincy Magazine and Dayton Magazine offers an effective means of promotion of your business and encourages financial literacy in the community. These are two major goals of the FPA of Southwestern Ohio.

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).

Letter from CFP Board to CFP Professionals

Excerpted Reprint of letter dated 11/13/2013

I am pleased to share with you that CFP Board's Board of Directors (Board) recently adopted a [resolution](#) supporting CFP Board's implementation of a new quality improvement **initiatives** for continuing education (CE), similar to practices utilized by the established professions. The Board also resolved that CFP Board would not enter the CE market as a provider at this time.

The new CE quality improvement initiatives adopted by the Board are modeled on the CE standards and program review processes of the CPA profession, which serve as a benchmark for a profession based on technical accuracy and regulatory compliance. CFP Board's implementation of the program will include a number of short- and long-term initiatives to be implemented over the next three to five years, in partnership with CFP[®] professionals and CE Sponsors registered with CFP Board. With this plan, CFP Board will:

- Implement a complaint procedure for CFP[®] professionals to report concerns with CE programs;
- Require CE Sponsors to state each program's learning objectives, so that the attendees will know what they are expected to learn;
- Require CE Sponsors to state the level of complexity (i.e., beginner, intermediate, advanced), so that the attendees can select content for their level of expertise;
- Enhance auditing of CE programs by CFP Board staff;
- Collaborate with CE Sponsors to redirect the culture of the CE business to focus on quality;
- Develop a recognition program for CE programs that meet high quality standards and receive positive feedback from CFP[®] professionals; and
- Update CFP[®] professionals on the aggregate results of CFP Board's CE programs audits.

The Board's resolution is the latest development in CFP Board's review of the CE requirements for CFP[®] certification. Last year, CFP Board staff and our Council on Education completed a comprehensive review of our CE requirements and developed several recommended revisions, which were released for public comment in August 2012. That public comment period generated a high level of response from CFP[®] professionals and our other stakeholders, and the core messages we heard from those comments were 1) the *quantity* of CE currently required is sufficient for continuing competency, and 2) CFP Board needs to take action to raise the *quality* of the CE programs available to CFP[®] professionals.

We appreciate the thoughtful and constructive feedback that many CFP[®] professionals, CE providers and others in the financial planning profession have provided during CFP Board's intensive review of our CE standards and requirements. CE plays an important role in the CFP[®] certification requirements, as the continuing competency of CFP[®] professionals is an essential element to protecting the public and earning its trust.

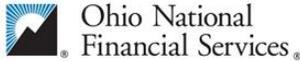
We look forward to working with you to achieve our goal of increasing the quality of CE by putting in place standards and review processes consistent with those which have proven effective in the established professions.

FPASWO Partners with 55KRC to assist with "Hometown Entrepreneurs"

Details are being developed and will be released soon. 55KRC is planning to produce a radio program highlighting "Hometown Entrepreneurs" FPASWO has been asked to help with the project.

Remember our Sponsors

"Support Those- Who Support Us- Supporting You"



Key Private Bank

