FPA
FINANCIAL PLANNING ASSOCIATION
OF GREATER CINCINNATI
The Heart of Financial Planning™

Greater Cincinnati
Financial Planning Association

May 2012 Newsletter - Issue #5, Volume 2

In This Issue…

CHAPTER RELATED

1. June 26 FPA on Tap
2. July 17 Dayton Member Breakfast
3. August 7 Chapter Meeting

OTHER TOPICS

1. Call to Service on the Board
2. Covington Financial Education Day
3. Benefits of using OfficeKey
4. Cincy Magazine Advertisement
5. World Choir Games Volunteers
6. Heart of Financial Planning Award
7. Benefits of Online Training
8. FPA Client Education Webinars
9. FPA Membership Descriptions
10. Chapter Sponsor List
11. FPA Group Membership Discounts

2012 Board of Directors
Chairman – Michael Schneider
President – Bill Schretter
Programs – Nathan Duncan
Membership - Scott Edwards
Membership- Stephen Hester
ProBono- Chris Davis
At Large- Henrietta Nye
At Large - Shawn Kelley
At Large – Michael Armstrong
How about You?

This publication is for investment professional use only. Not for distribution to the public.

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.

* * *

Dayton Breakfast Meeting, July 17,

Presenter- Richard Stock, Director, Business Research Group at University of Dayton

7:30am to 9am, Dayton Racquet Club

Topic- *Economic and Financial Issues affecting the Miami Valley area that are important for you to understand to help your client properly plan. Please register for the event. CFP and Insurance CE being applied for.*

Chapter Meeting – Rookwood Towers

Tuesday, August 7, 2012, 11am to 1pm at the Rookwood Tower. Dr. LaVaughan Henry of the Federal Reserve will be our guest speaker. Topic - 2012 Economic Update

Location- Rookwood Towers, 3805 Edwards Road, Suite 700, (7th Floor), Cincinnati, OH 45209. Additional details on website.   *CFP and Insurance CE being applied for.*

June 26 Webinar, FPA on Tap, and Reds Game

Webinar presentation will be announced soon. Tickets on sale now.   This is the last “FPA on Tap” for the year. Please register for the event.

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 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, contact Misty or Jessi at admin@fpacinti.org.

Your doctor maintains multiple offices, you can too.

It is likely that your doctor maintains an office in your part of town to be convenient to you and maintains an office in another part of town to be convenient to people there. You can do the same for your clients. This is one of the reasons firms use OfficeKey. They can invite clients to their office Downtown, Hyde Park, Blue Ash, West Chester and Northern Kentucky. Firms that use OfficeKey have an online calendar that allows them to reserve meeting rooms in any location. Clients are welcomed by a receptionist. Meeting rooms are private, quiet and equipped with large monitors.

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.

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. 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.

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

The Benefits of Online Training

Training and growth are vital to success throughout the career of a financial advisor, Para-planner, office manager, and other key employees in your office. Consider this basic fact presented in an article posted on Career Toolkits.

> *"(Financial planners) find that … income is tied to your ability to attract and retain new clients, so it's important to work to improve your sales and marketing skills throughout your career."*

Another article related to how financial planners make money says this,

> *"… marketing and selling can be critical to success in the industry, so improving sales skills might be a way to stay competitive. Further education, particularly pursuing the Certified Financial Professional certification, may also help to gain an edge in a competitive field."*

How do you get the training you need in a cost and time effective manner? Thanks to the internet and all the connected devises online study is a popular and effective choice for many learning and growth needs for yourself and your office. For many the option of studying at home in a self-directed time and pace is far more practical and cost effective.

Here are just some of the benefits of online learning:

- Study in your own time, on your own computer
- Learn at your own pace - not that of your peers or trainer
- More cost effective compared to other training methods
- No travel related expenses of either time or money
- Certify your knowledge and show your peers and co-workers your new skills
- Save money and time for live training by covering the basics with online training
- Give yourself the best chance of career growth

BSB Partners, Inc. has partnered with BizLibrary, the nation's leading online training and e-learning provider for small and mid-sized organizations to provide our member organizations affordable and flexible solutions that deliver real business results. The catalog includes over 8000 course titles spanning a variety of types, including e-Learning courses, streaming video, and video/DVD access, on topics such as:

- *Sales Skills*
- *Customer Service*
- New Management & Supervisor
- Leadership Development
- Legal Compliance
- Health and Safety
- Desktop Computing Skills

For a ***free*** demonstration of the site and a custom designed curriculum ***for individuals or organizations***, click here. Try out any of these courses for free:

- Preparing for Successful Sales (sale_01_a03_bs_enus)
- Sales Communications Essentials (SALE0432)
- Strategic Account Sales Skills Simulation (SALE0130)
- Introduction to Sales (sale_01_a01_bs_enus)
- Delivering High-impact Sales Presentations (SALE0135)
- Building a Winning Sales Team (SALE0151)
- Motivating a Winning Sales Team (SALE0153)

Contact BSB Partners, Inc. if you need help creating your training curriculum. Beckie Schretter would love to serve your talent management, training, and team building needs. Call 513-907-8922 or email beckie@bsbpartners.com. Learn more at www.BSBPartners.com

FPA and Client Education Webinars

The FPA offers free webinars that you can use with clients as a means of educating them about important topics in the financial planning process. The FPA encourages you to review these webinars and have colleagues in your office review these webinars for educational purposes.

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

Remember our Chapter Sponsors

"Support Those- Who Support Us- Supporting You"

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

See our website for details: www.fpacinti.org