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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.

**November 2014**

## 2014 Financial Planning Days

As announced at the November chapter meeting, the 2014 Financial Planning Day was a hit. Bill Schretter and Chris Davis appreciate all the volunteers that assisted with the event. Without such programs, many of these individuals would just receive advice from a neighbor, friend, or social worker. As professionals, we give better advice. It is amazing how we even had some high net worth individuals come and seek a second opinion from our impartial volunteers regarding their financial situation. A special thank you to the Simply Money team for advertising the event on the radio program and website.

## FPASWO offers CFP Ethics Webinar & Test

The FPA of Southwestern Ohio is offering the CFP Board approved Ethics webinar to our members for a small fee. If you or someone you know needs to complete your **CFP Board Ethics Requirement**, please contact [admin@fpacinti.org](mailto:admin@fpacinti.org) to gain access to the updated webinar and test.

## Junior Achievement needs your help

Junior Achievement is planning for the 2014-2015 school year. Please contact [Junior Achievement](#) to express your interest in volunteering. They are flexible with schedules. The goal is to provide financial literacy and work readiness training to students in grades 1-12 in schools throughout the region. The curriculum is easy to teach. All supplies are provided. This is a great advertising opportunity for your business. Encourage an employee to help with the JA mission.

## Become an Expert – Work with the Media

**Reminder** - Getting published is great free publicity. See the [Financial Planning Magazine Editorial Calendar](#). Please complete the [FPA Media Training](#) to receive Media alerts.

# FPASWO NexGen Group

You are invited to become a founding member of our chapter's very own NexGen community! For those who haven't heard, FPA NexGen is a well-established national community geared towards younger financial planners (technically 36 years or younger) and those who are new to the profession. NexGen even made the cover of this month's Journal of Financial Planning (If you missed it, you can check out the article [here](#).).

The NexGen includes energetic gatherings of young professionals (including the occasional happy hour or sporting event) where hot topics, such as technology/"robo-advising," social media compliance, succession planning, launching your own practice, and general career development strategies can be openly discussed in an organized yet informal setting.

Want to find out more? Simply reply to [admin@fpacinti.org](mailto:admin@fpacinti.org) and let us know you're interested. Also, be sure to join our new LinkedIn group ([NexGen of Southwestern Ohio](#)) to network with fellow "NexGenners" and to stay up to date on all of our events and discussions.

If you know of any colleagues or friends who would be interested in joining, please feel free to inform them.

## Remember Our Sponsors

"Support Those- Who Support Us- Supporting You"

