

February 11, 2016

# FPA OF THE TRIANGLE

## NextGen Committee Announcement



Please join the FPA of the Triangle in welcoming Michael Whitman, MBA, RFC® as the newest member of the Board of Directors. Michael will be serving as the NextGen Committee Chair in 2016-2017.

The FPA NextGen is a community for FPA members age 36 and under that focuses on the next generation of financial professionals. NextGen's mission is to provide members with a network that serves to support, advise and encourage one another in professional development; promote, foster, and direct programs that aid in knowledge transference; and to explore the issues common to younger planners and seek means of accentuating the positives and finding resolutions for the negatives.

Michael brings his experience with networking groups and helping and educating young professionals to the FPA Board. He recently co-founded a company that is focusing its efforts on helping young professionals clean up their finances so that they can feel more comfortable getting involved and giving back to their communities. He is motivated to create a NextGen program that the FPA of the Triangle can be proud of and we are excited to have him on board!

If you have any questions or are interested in getting involved, please contact Sara Whitley at [administrator@fpatriangle.org](mailto:administrator@fpatriangle.org) or (919) 232-0120.

### 2016 EVENTS

#### February

- 9 Board Meeting
- 11 Chapter Meeting

#### March

- 8 Board Meeting
- 10 Ethics Meeting

#### April

- 12 Board Meeting
- TBD Nex Gen Event- *Are you under 36 and a member of the FPA? Look for more information on this event!*

#### May

- 10 Board Meeting
- 12 Practice Management Event  
Sponsored by: Ameriprise  
Financial Services  
6pm - 9pm  
Brier Creek Country Club

#### June

- 7 Board Meeting
- TBD Women of FPA Event

*Mark your calendars!  
Don't miss these great events!  
2016 Education Symposium- October 13, 2016*

### Mission

Our mission is to serve our members through education, professional development, networking and advocacy.

### Vision

The FPA of the Triangle is the preeminent organization for all financial professionals. The FPA of the Triangle provides a forum for continuing education, career development, and active networking while adhering to the highest ethical standards.

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# March 10, 2016 Ethics Meeting

This course satisfies the ethics requirement of the CFP® Board of Standards and the N.C. Department of Insurance. In one day you will be able to knock out all three hours of your required NC Insurance Continuing Education at our March Ethics Program & Lunch! Harry Greyard, CFP® will present "Ethics 2016" on Thursday, March 10<sup>th</sup> from 11:00am to 2:00 pm at the Brier Creek Country Club.

- Review ethical concerns identified by the CFP® Board regarding compensation disclosures, financial-planning services, conflicts of interest, and fiduciary standards;
- Review disciplinary cases heard by the CFP® Disciplinary and Ethics Commission;
- Understand the current issues of concern being addressed by the Disciplinary and Ethics Commission.



*Bring a Guest*  
Members, did you know that you can bring a colleague, friend, or business associate to an FPA chapter meeting for free? First time guests are always welcome. Simply send an email to: [administrator@fpatriangle.org](mailto:administrator@fpatriangle.org) with your guest's name, company affiliation and email. We will take care of the rest!

## Membership has its privileges!

Join FPA to receive discounts on the following, just to name a few:



## Looking for more? Check out onefpa.org



### 2016 Trends in Practice Management: Understanding and Driving Client Value

- How do advisers today view their businesses, future and challenges?
- What is the scope and scale of advisory businesses today?
- What are the key issues that advisers are addressing, and how can they, and you, take action?

This report aims to help financial advisers of all business models understand how their peers view their businesses today with respect to several key practice management issues – today and in the months and years that follow. The report is purely quantitative to give you the metrics you need to see how you and your business compare to your peers. In February, March and April 2016, we will introduce a series of exclusive whitepapers that will further dig into the data and offer actionable next steps to help you apply the knowledge gained from the research.

For a PDF download go to [https://www.onefpa.org/business-success/ResearchandPracticeInstitute/Documents/FPA\\_TrendsInPracticeManagement\\_R7\\_FNL.pdf](https://www.onefpa.org/business-success/ResearchandPracticeInstitute/Documents/FPA_TrendsInPracticeManagement_R7_FNL.pdf)