FPA. FINANCIAL PLANNING ASSOCIATION OF IDAHO

The Heart of Financial Planning™

IDAHO NEWS

IDAHO CHAPTER
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President's Message

Integrity is listed first in the FPA's code of ethics. It says in part: ***The ultimate source of such public trust is the FPA member's personal integrity. In deciding what is right and just, an FPA member should rely on his or her integrity as the appropriate touchstone.*** We must constantly remind ourselves that clients do place a great amount of trust in us and it is our duty to act with the utmost integrity.

The moment we allow ourselves to deviate from what "our gut" tells us is right, we have betrayed that precious trust given to us by our clients. With that said, our practice is much more an art than a science and there are always multiple solutions to any one problem.

I believe most of us operate with integrity, but there is always opportunity to stray from the line and act without it. Let us resolve to uphold a high level of integrity.

An additional aspect of integrity that I think is imperative for client relationships: doing what you said you would do, when you said you would do it. I think very often this is a lost trait in today's society, and especially in the public square. If you tell a client you will call them back with the information requested…do it! If you tell a client you will meet with them next month…do it! If you tell a client you will have your staff get them specific information by this week…do it!

Nothing is more aggravating then the continual 'bottom up' reminder to a professional. This characteristic in and of itself will propel you in your clients eyes. They will know, 'when my advisor says he will do something…he will do it and on-time'. What a great industry attribute we could all subscribe to.

Success to you,

Tom Steelman

Visit our website at www.fpaidaho.org

Upcoming Member Luncheons

Tuesday, October 18th

"Current State of the Mortgage and Lending Environment"

Presented by Kevin Helmick, Senior Loan Officer at Bank of America

12:00 – 1:30 pm

Arid Club

Tuesday, November 15th

Presented by Lance Fenton, with Cooper Norman

12:00 – 1:30 pm

Arid Club

Sponsors are needed to help cover the cost of the luncheons as well as bring awareness to new and existing businesses. If you are interested in being a sponsor or know a potential sponsor, please contact any board member. The sponsor benefits are listed on the Idaho website at http://fpaidaho.org Click on the sponsor opportunities link.

Local Members – Free

Non-Members - $25

First time visitors may join us for a complimentary lunch

"Smart Women, Smart Money" Saturday, October 1st at Boise Centre.

Financial conferences and workshops offer Idaho women of diverse ages and circumstances, an opportunity to learn the necessary information to take control of their financial lives. It is never too late, or too early, to learn about finances.

The FPA has an exhibitor's table and needs volunteers to answer questions during the conference. **Sign up at the luncheon or contact our administrator if you are interested in attending "Smart Women, Smart Money".**

Thank you to our sponsors!

Peter Butler with Valtrend

Pete has more than 15 years of diverse financial and business valuation experience.

Peter has valued both privately-held companies and publicly-traded securities for mergers and acquisitions, buy-sell agreements, venture capital investment, fairness opinions, financial reporting, 409A stock options, litigation support and estate and gift tax planning and compliance.

Peter has published a variety of articles in all of the major U.S. business valuation journals, as well as in a Romanian journal. He has been invited to speak at numerous national and regional business valuation conferences on the topic of a private company's cost of capital. Peter is also an Adjunct Faculty Professor of Finance in the MBA Program at George Fox University.

We look forward to hearing from Pete, at our September 20th luncheon.

Volunteer your time at "Smart Women, Smart Money" in tandem with Financial Planning Week.! There will be many with questions that are in need of your expertise.
With over 24,000 members in the Financial Planning Association, if we all just did ONE THING, imagine the impact we could have on shaping our profession!