FINANCIAL PLANNING ASSOCIATION of Middle Tennessee

The Heart of Financial Planning™

FPA of Middle TN
P.O. Box 150608
Nashville, TN 37215
615-473-1450
fpamidtn@bellsouth.net

A Gold Level Chapter May 2009

Mark your calendar!

2009 Chapter Meeting Dates

June 17 program presented by Steve Crunutte
July 15
August 19
September 16
October 5-9 FP Week
October 21 Symposium
November 18
December – no meeting

Chapter Meeting Location

Lipscomb University
Ezell Center, 3rd Floor, Room 301
3:15 Refreshments, networking
3:30 - 5:00 Meeting

Board Meetings

Ezell Center, Room 363, 2:00 p.m.
May 20 July 15
August 19 October 21
December – planning meeting

The May meeting is sponsored by

GRUBB & ELLIS
Realty Investors

Chapter Meeting May 20

The Credit Crisis

Recession/Depression/Recovery?

Presented by

Frank Mastrapasqua, Ph.D.

Portfolio Manager, Chairman and CEO

Dr. Mastrapasqua began his career in academia serving as chair and professor of economics and finance at the University of Houston and as an adjunct professor for New York University's Graduate School of Business. He quickly moved to Wall Street spending much of his career as the chief economist and portfolio investment strategist for leading New York investment companies including L. F. Rothschild, Unterberg, Towbin and Smith Barney, Harris Upham. As a trained economist, Frank has a profound understanding of capital markets, as well as the influences of the U.S. and world economy.

In 1986, Frank was recruited by Nashville-based J. C. Bradford & Co. to serve as Partner, Director of Research and Chief Investment Strategist. And later, in 1993, Frank founded Mastrapasqua Asset Management, a leading money management and independent research firm.

Approved for one hour of CFP CE!

3:15 networking and refreshments
3:30 – 5:00 meeting
Lipscomb University
Ezell Center, Room 301

Invite a colleague to the meeting!

The FPA of Middle TN Awards a $1,500 Scholarship to Pearl-Cohn Graduate

Quaker Manuel was presented a $1,500 scholarship from the FPA of Middle TN at *A Taste of Nashville* on April 19th. Manual had a 4.0 GPA and a 31 on his ACT. He was Valedictorian and a Distinguished Scholar. He will attend Tennessee State University majoring in Computer Science.

FPA Launches Enhanced PlannerSearch ®

FPA's popular online tool connecting the public with FPA members was recently upgraded. FPA members will find expanded search functionality and improved accessibility on the new PlannerSearch.

Eligibility Requirements

- Must be a current member of FPA
- Must be a CFP® certificant
- Must be an RIA or bank affiliate
- Must adhere to FPA's Code of Ethics

By signing up for an Enhanced Listing ($99), which provides you with lots of extras, or a Basic Listing (free), you gain visibility with thousands of potential clients a month.

Sign up today!

FPA Practice Management Center is now live!

FPA has launched a valuable new member benefit: the FPA Practice Management Center at www.FPAPracticeManagement.org.
Harnessing the collective brainpower and years of experience of our members, the new site offers:

- Multi-media Practice Management Resources including print articles, webinars and conference audio.
- An Ask the Expert function where members can ask specific questions about their practices to industry experts.
- A Share Your Own Content feature for planners to submit business tools they've found useful in their practices. We'll share the best tools online with fellow FPA colleagues.

Check out the site and learn how you can qualify for our iPod give-away! We'd also appreciate your feedback. E-mail your comments to Christina.Nelson@FPAnet.org.

Financial Planning Week EXPO We need your help!

Financial Planning Week®, October 5-11, 2009, brings together those who provide, support and benefit from professional financial planning. During this week, FPA strives to build public awareness of the financial planning process, enabling individuals to make prudent financial decisions to achieve their life goals and dreams. But we need your help!

In celebration of FP Week, the FPA of Middle TN is hosting our 4th annual Money MakeOver EXPO. This is an exceptional opportunity for us to show the community what a wonderful profession we represent. But it cannot happen without your help. You may be able to conduct a money makeover or your talent may lie in organizational skills for the event. Either way, please step up to help. Let's make this event all it can be.

If you are available to assist with the planning of the event, please let me know. We need your help!

Paul Stovall, CFP®
FPA-Mid TN Chapter President

Financial Books Needed (paperbacks only!)

As an extension of the financial literacy classes being taught at the Correctional Development Center we are collecting financial books to start a library. The books should be basic in nature, consumer friendly and **paperback**!

If you have books to donate please bring them to a chapter meeting, or let us know and we will make arrangements to get them from you.

Thank you!
Royce Monk, CFP
Correctional Development Center Chairman

Welcome New Members!

Carl F. Domingue, CFP®
Pinegar Domingue Financial

Ron D. Hammond, CFP®
transfer from Iowa
Wealth Management Financial Planning Strategist III - Bowling Green, KY

Mark C. Hill, CCIM
James Talley & Associates, Inc.

Matthew P. Wiley
ING Financial Advisors

Green Hills Study Group

2nd Thursday, May 14
12:00 pm. – 1:00 p.m.
Bring your lunch and a topic!
2000 Glen Echo Road, Suite 209
(next to the Green Hills Post Office)
For additional information:
Kay Quinn, kay@kayquinnfinancial.com

Brentwood Study Group

2nd Wednesday, May 13
7:00 a.m. - Puffy Muffin
Franklin Road, Brentwood
For additional information:
Doug O'Rear, 615-371-8596
Will Welborn, 615-370-0750

Dr. Ted Klontz Study Group

Monday, June 3 at 3:00 p.m.
Bolen | Dodson
7003 Chadwick Drive, Suite 350
For additional information contact Bob Bolen at bob@bolendodson.com or 615-242-3808.

FPA Virtual Learning Center

- Take part in 1- to 2-hour live audio and Web-based presentations
- Ask questions of expert speakers for 10 to 15 minutes at the end
- Qualify for CE credit and have it reported automatically for you by FPA
- Find popular learning modules in the Class Archives

Upcoming Live Events**

May 13, 2009 (2–3 p.m. EDT)
Five Things You Need to Know to Sell Your Practice Today
Andrea White, Samuel Hull and David Grau, Sr.
Early-bird price - $25 FPA members, $35 nonmember.
After May 13 - $35 FPA members, $45 nonmembers

May 18, 2009 (2–3 p.m. EDT)
Healthcare Planning for Your Practice: What Financial Planners Need to Know to Help Their Clients
Sanford J. Mall, JD, CELA
Early-bird price - $35 FPA members, $45 nonmember.
After May 18 - $45 FPA members, $55 nonmembers

May 22, 2009 (2–3 p.m. EDT)
Uncertain Times Series: May Peer-to-Peer
Courtney Pullen, Marc Freedman and Darryl Celkupa
Free FPA members, $55 nonmembers

**VLC dates, topics, and presenters are subject to change without notice.

FPA COMMUNITY BUILDING
Building the FPA Community one conversation at a time

http://community.fpanet.org

Cloning Best Practices

I have been a volunteer with the Davidson County Reentry Pro Bono financial planning effort for a couple of years now. When asked by Williamson County's 21st Drug Court if I would help clone that effort for the benefit of the 21st Drug Court enrollees, I readily accepted. Since the program was already in great shape, I just needed to confirm 6 volunteers for the dates and times of the classes and make sure everyone had access to the curriculum outline and handout worksheets. We are now in the middle of our latest Pro Bono effort, teaching about 35 enrollees the basics of retirement planning, estate planning, investments, insurance and credit.

It is a blessing to be part of this effort. Thanks to those who stepped up to help.

If members are aware of other Pro Bono opportunities in your community, cloning what we have already developed is quite easy. Just give us a call and we'll help you get started.

Robert V. Bolen, CFP, CFA
Bolen | Dodson & Associates
615-242-3808 (w)

Thank you to the Williamson Count 21st Drug Court Pro Bono volunteers!

Dean Winn
Doug O'Rear
Chris Jenkins
Vance Lahey
Bryan Fay
Bob Bolen

Corporate Partner Opportunities

Recognition, Exposure, Networking
Please refer a Partner!

Shannon Buckner, CFP®
SunTrust Private Wealth Management
615-507-7828 or
Shannon.buckner@suntrust.com

We are FPA.™

SOCIAL SECURITY

The latest edition of the ***Social Security Update*** is posted online.

Read the April newsletter in its entirety by simply clicking on
www.socialsecurity.gov/newsletter

FPA National Conferences

July 31–August 2, 2009
NexGen
A communities of interest conference for the next generation of the financial planning profession with a strong focus on networking, as well as programming that supports technical and career development.

October 10–13, 2009
Annual Conference & Expo Anaheim
This conference of the financial planning community is a one-stop-shop that provides high-quality, unbiased education. From technical nuts-and-bolts, to back-office compliance-focused issues, to client communication, to investment strategies, this event offers the opportunity for professional development, regardless of career level or career path.

Our Mission

The mission of the FPA of Middle TN is to advance the profession of financial planning in Middle Tennessee and to provide quality, professional education to our members and to the public.

SCARLETT Leadership Institute
BELMONT UNIVERSITY

The Scarlett Leadership Institute at Belmont University in partnership with Kaplan Schweser, a leading financial education provider, offers a financial education program to assist you in completing the education requirements to sit for the CFP® Certification Examination. Our extensive financial planning knowledge and expert instruction are the essential tools to maximize the relationship with your clients and increase your productivity.

The next class begins on Monday, **May 11th**.

For more information, please contact Lindsey McCullough, Program Manager, at (615) 460-6546 or mcculloughl@mail.belmont.edu.

FPA Quick links:

- Join - http://www.FPAnet.org/Membership/Individual/
- Renew - http://www.FPAnet.org/Membership/Join-Renew/
- Refer a colleague - http://www.FPAnet.org/Membership/ReferaColleague/
- Update Profile – http://www.FPAnet.org/CreateModifyLogin/EditProfile/
- PlannerSearch (member) – http://www.FPAnet.org/Membership/PlannerSearch/
- PlannerSearch (consumer) - http://www.FPAforFinancialPlanning.org/fpa4fp/customapps/search.cfm
- Career Center - http://careers.FPAnet.org/
- FPA Store - http://www.FPAnet.org/FPAstore/
- Annual Conference - http://www.FPAAnnualConference.org/
- Virtual Learning Center - http://www.FPAnet.org/Learn/VirtualLearningCenter/

FPA Benefits at a Glance

☐ 12 Free continuing education credits with the Journal of Financial Planning online exam – a $300 value
☐ An annual subscription to the Journal of Financial Planning – the FPA's official, peer-reviewed monthly publication – a $90 value!
☐ Solutions – a bimonthly, FPA members-only publication, offers ideas and concepts to help improve the efficiency and profitability of your practice.
☐ Complimentary quarterly practice management CD's, containing cutting-edge presentations from leaders in the financial planning profession.
☐ FPA This Week – FPA's weekly e-newsletter, which brings you updates on FPA happenings and current industry events.
☐ Regular updates, through FPA's government relations efforts, on changes and current trends in compliance and regulatory requirements that could affect the way you do business.
☐ Opportunities for networking with your peers and mentors across the country, via an online community or face-to-face at national conferences.
☐ Access to unmatched educational programs including national meetings, self-study courses, and virtual sessions through FPA's Virtual Learning Center at discounted rates.
☐ Substantial members-only discounts on practice management and client marketing tools, education products, continuing education exams and more.
☐ Affiliation with a local chapter in your region.
☐ Opportunities for giving back to the profession by helping consumers in need with pro-bono financial planning assistance.
☐ Access to FPA's Online Practice Services Center, which includes a compilation of resources, business ideas, practice management techniques, products, services, and partnerships to support you in creating the kind of practice you desire.
☐ Reduced tuition rates to CFP Board-Registered programs, free assessment tests and CFP® review materials at reduced rates.

In addition, your local Middle TN chapter provides you with networking opportunities, CE at chapter meetings, annual Educational Symposium, opportunities to give back to the community, and much more!

For more information on how to become an FPA member, please visit the national website at www.fpanet.org.

Thank you to our meeting Sponsors!

Emily James
Community Relations Coordinator
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For additional information please contact our chapter administrator at 615-473-1450 or fpamidtn@bellsouth.net.

We hope to see you

at the next

Chapter meeting

on May 20th!
