

SHARE THE WEALTH

GROWING YOUR PRACTICE WITH FPA OF MIDDLE TENNESSEE



2018 SYMPOSIUM EDITION
6 NOVEMBER 2018

PRESIDENT'S WELCOME

**SYMPOSIUM KEYNOTE:
LEADING WITH POWER &
PURPOSE**

CONTINUING ED. RECAP

2018 ANNUAL MEETING

**MEMBER RECOGNITION:
LONGEVITY AWARDS**

A STRONG COMMUNITY

UPCOMING EVENTS

PRESIDENT'S WELCOME

by Nathan Greene, CFP®

This month in *Share the Wealth*, we recap an eventful Symposium and look forward to the year's final events. 2018 has been an exciting year that we have been very grateful to share with you all!

If you could not make it last month, our Symposium was full of top notch speakers, resourceful corporate partners, and about 100 of your closest professional friends! In this jam-packed day, we (1) heard an update on the new CFP Ethics' Standards, (2) spoke directly with our corporate partners in our "partner roundtable," (3) got a first-person look at OneFPA's Strategic Initiatives, (4) elected our chapter's 2019 Board of Directors, (5) had a very thorough look at our purpose in this industry and the way we create a lasting legacy, and (6) audited our investment-worldviews to pair up with the future that lies in wait!

Read on for a thorough recap and pics of the entire event and the enjoyable "Topgolfing" that followed. We're sad to be coming to the close of our major 2018 programming but are excited for 2019 and to see you at this month's Knowledge Circle (in Franklin this month - for those of you down south). Please reach out to me at fpamidtn@gmail.com or our Chapter Executive, Scott Sivley, at scott.sivley@fpamidtn.org to get involved. I look forward to seeing you at the upcoming events. Thank you for being part of our chapter!

FPA NATIONAL LEADERS OFFER SYMPOSIUM KEYNOTE: LEADING WITH POWER AND PURPOSE

FPA National Executive Director & CEO, Lauren Schadle, CAE (pictured right) and Frank Paré, 2018 President (pictured lower right) delivered the keynote address. Both reminded attendees we are part of a growing, dynamic family of professionals united in power and purpose to elevate financial planning to the same level of understanding and recognition as other noteworthy professions including law, medicine, and accounting.

FPA is investing in your future by focusing on providing critical support that enhances knowledge, skill-sets, and business acumen. These efforts also coalesce to offer a path forward for the profession. Attendees were encouraged to learn more about (1) FPA's work, (2) how FPA supports members and the financial planning community, and (3) FPA's vision for increasing the profession's notoriety and esteem. To accomplish these important member-driven ambitions, FPA invests time and resources prioritizing its value lines. Here is a brief overview of each of the four.



Advocacy

FPA, on your behalf and as your representative, is an impactful voice. Staff and members, like you, engage federal and state policymakers, lawmakers, and professional certifying bodies to direct the conversation.

Community

Members serving members brings and keeps us all together as we grow and diversify. Chapters deliver the value you expect and augment our connective fiber through programs like NexGen and Knowledge Circles.

Business Support

Professional development programming to complement your life-long learning and personal attributes. Programs like Coaches Corner help you drive business success, MediaSource increases your visibility in the community, and FPA Research provides insight into your clients' pressing concerns.

Education

Planners and advisors become the best you can be through in person classroom settings and virtual education experiences. The work of chapters like FPA of Middle Tennessee makes learning accessible and relevant at a local level.

Their address concluded with a call for action. You have a role in elevating the profession. We need your input, involvement, and partnership today!

Thank You Platinum Partner

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illuminate the possibilities.

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Continuing Education Recap

What are the new standards? What legacy will you leave? And, will you get what you expect? Such teasing questions weaved together to form a captivating and relevant continuing education program for the day.



CFP Board's Revised Code and Standards

Did you know the CFP Revised Ethics Standards take effect on October 1, 2019? If you attended symposium, you do! Jeff Rattiner, CPA, CFP®, MBA President & CEO of Rattiner's Financial Planning Fast Track, Inc. and JR Financial Group, Inc. kicked off the day by guiding participants through the revisions and ramifications. His program concentrated on the significant changes to content and the new structure and organization of the standards. He led discussion with practical examples useful for all financial professionals.

What You Can Leave Behind

W. Eric Hehman, CFP® Chief Executive Officer & Principal of Austin Asset kicked off the afternoon session. He took attendees on a guided tour through one of the industry's most urgent business issues- Succession. His advice for the audience: it is never too early to start planning your legacy. The session supplied an analysis of the operational, financial, and emotional elements that drive successful management and ownership transitions. Mr. Hehman offered firsthand insights and practical guidance about how to ensure a successful leadership transition that retains your and your clients' values.



Do you always get what you expect?

Meb Faber, Co-Founder & Chief Investment Officer of Cambria Investment Management, led the final course of the day. He shared his insights on effectively using Bogle's Stock Valuation Model and projecting return on investments. He shared perspectives with attendees on how they might avoid market cap weighted bubbles by adding portfolio tilts into their strategies. Faber encouraged the audience to mitigate against high valuations. One way to do that is diversifying into the Global Market Portfolio. He closed by offering suggestions on how to put it all together and suggesting free resources attendees can use including his own firms.

Attendees who attended the entirety of each session received four continuing education credits. The evaluation forms showed a high level of satisfaction with more than 90% rating each session at very good or excellent.

Continuing education continues to be the number one reason people say they attend meetings. We'd love to hear your thoughts on future continuing education topics. Just email us at fpamidtn@gmail.com

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2018 Annual Meeting

This year's annual meeting of the membership took place during the symposium lunch. Chapter President Nathan Greene presided and reported on the health of the chapter. He thanked each of our sponsors for attending and participating. The meeting focused on honoring the service and loyalty of members through the years, because as he said, "each of you make this chapter what it is today and what it will be tomorrow."

After announcements, President Greene recognized and thanked those board members who are not returning in 2019.



Following a round of applause, President Greene asked for the 2019 Executive Officers to join him at the front of the room. The Chapter's 2019 Executive Committee is:

Chairman: Michael Wallin, CFP®

President: Nathan Greene, CFP®

President-Elect: Dr. Burton Williams, CFP®

Treasurer: Daniel Killian, CFP®

Secretary: Dr. Fred Kendall, CFP®

The meeting continued with President Greene calling Dr. Burton Williams, 2019 President-Elect and chair of the nominations committee, to present the nominating committee report. Afterwards, the attending members voted by acclamation to elect:

Kate Dore, Candidate for CFP® Certification

Jennifer Hunt, Attorney-at-Law

Brian Johnson, CFP®

Kevin Mitchell, CFP®

Danny Raube, CFS®

Garrett Sorensen, Candidate for CFP® Certification

Lindsay Youngbauer, CFP®



President Greene thanks Director Moore for his long and dedicated service to the Chapter.

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President Greene thanks Treasurer Grodi for her committed service to the Chapter this year.

Member Recognition: Longevity Awards

This year the Board of Directors' membership committee, chaired by Garrett Sorensen, began a new tradition with the inaugural Longevity Awards Ceremony. The Chapter proudly acknowledged nine individuals who have been members for more than 30 years!

- **Carl Apple, 46 years**
- **James Harris, 45 Years**
- **David Moore, 36 Years**
- **Jack Turner, 36 Years**
- **Darryl Edmonds, 35 Years**
- **Royce Monk, 35 Years**
- **Buddy Wootten, 35 Years**
- **Timothy Greer, 35 Years**
- **Stephen Reed, 33 Years**

Several recipients are founders, past presidents, and nationally recognized service leaders. Director Sorensen said, "Our chapter success today would not be possible without the legacy and ongoing commitment of founding members, leaders, and those trailblazers who have shown the way by their professional success, personal commitments, and care for the profession." We look forward to continuing this ceremony for many years to come. Someday it will be you!

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President Greene and Director Sorensen
with Stephen Reed



President Greene and Director Sorensen with
Director Edmonds



President Greene and Director Sorensen with
Buddy Wootten

A Strong Community

Closing Session

President Greene closed the annual symposium echoing the national leaders' exhortation for community building and active, intentional advocacy. "You, as a financial planning professional, are much better positioned to explain what the profession needs," he said. He concluded by sharing his personal thoughts on 2018 and how encouraging it was to see increased attendance at meetings, members connecting before and after events, and the sharing of ideas to grow the chapter for the benefit of each member and the whole community.

With that the business part of the meeting closed. Next on the agenda, was the drawing for those who completed the member survey and followed us on social media. We will share results of the member survey in the December edition, but a big thank you to all who took part in the activities of the day. The Chapter significantly added followers across our social media platform and received valuable, usable feedback from the surveys. Here are the winners of the drawings.

Winners of the Afternoon Prize Drawings



Laura Davis
\$50 Amazon Card



Lori Carver
\$15 Starbucks Card



Erik Milam
Signed Hehman Book



David Walden
Signed Hehman Book



"Top Golfers" Lisa Dreher and Danny Raube after some friendly competition.



Tony Helton, Lenda Elmlinger, and Hunter Yarbrough about to swing away.



Chairman Wallin opens the 2018 Symposium.

Upcoming Events



How Best to Utilize Bonds in Today's Volatile Market

Wednesday 14 November 2018

3:30 - 5:00 PM

Complimentary Appetizers

1110 Hillsboro Road, Suite 260

Franklin, TN 37064

[RSVP Here](#)

First Meeting of 2019

Wednesday 16 January 2019

3:30 - 5:00 PM

Networking @ 3:00 PM

Complimentary Reception @ 5:00 PM

Location: TrustCore

More Details Soon!



Thank You Silver Partners

SHARE THE WEALTH EDITORIAL TEAM

KATE DORE

Director of Public Relations

SCOTT SIVLEY

Chapter Executive

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