SHARE THE WEALTH

GROWING YOUR PRACTICE WITH FPA OF MIDDLE TENNESSEE

THIS MONTH'S ISSUE
MARCH 2019

PRESIDENT'S WELCOME

by Nathan Greene, CFP®

Welcome to this month's edition of "*Share the Wealth*," the periodical devoted to your professional development. In this month's edition, we focus on better knowing our members and better promoting your interests both collectively and individually. March is a busy month, so please read about all the possible events to take part.

I am excited to share that this month welcomes a new feature for the Year of You- Member Profiles. This month Burton William, who is not only your President-Elect but also part of the particularly important "allied professionals" constituency among us, shares his motivations and interests. Our annual "Advocacy Day" happens this month and will give you a chance to promote and protect the profession. You can kick-off March Madness with NexGen and wrap up the month with our March Knowledge Circle. Like I said, a full month that covers virtually every aspect of what it means to be a member of FPA!

Again, March is a busy month. You can get involved to help the profession, grow your network, and help another along the way.
I encourage you to take the first step. As a group of practitioners seeking to improve our practices – as well as the industry as a whole – we hope to grow with you in 2019. We hope you can use this edition of "*Share the Wealth*" as continued guidance on our ever-changing industry, and if ever you have story ideas, comments, or questions, please do not hesitate to reach out to me, Nathan Greene, or our Executive Director, Scott Sivley. We would love to hear from you!

MEMBER SPOTLIGHT

DR. BURTON WILLIAMS, CFP®

Burton began his career in financial services with Wachovia Securities and served more than 450 financial advisors with client financial and estate planning needs. He currently serves as Lipscomb University's Associate Vice President for Planned and Complex Giving and is an Associate Dean for the College of Business.

Burton holds a Doctor of Education from Lipscomb University, Master of Science in Financial Planning from the College for Financial Planning and an Accounting degree from Freed-Hardeman University. He is as an adjunct instructor in finance and management and currently serves as president-elect of FPA of Middle Tennessee.

Why did you get involved with FPA? I first became a member of the FPA to stay current on what was going on in the industry. I have stayed a member because of the relationships I have formed through FPA of Middle Tennessee.

How have you benefited from being an FPA member?
I believe in the importance of community, and as an FPA professional, this extends to my professional community. The FPA offers many opportunities for networking in a variety of ways. I especially enjoy the knowledge circles for a smaller setting and in-depth discussion on specific subjects.

Why do you choose to serve on the Board? I was a member for several years and, quite frankly, was sitting on the sidelines and not very involved. One of the members asked me to consider becoming involved in pro bono work, especially with the Nashville Rescue Mission. I was not initially interested and a little intimidated at first, but after going with a member to the mission and sitting in on a financial literacy training, I was hooked. The men we serve through this important pro bono opportunity are bright and engaged in learning.
Later, I was asked to join the board and really began to feel a part of the bigger picture of what we are trying to accomplish through this professional organization.

What words of encouragement would you give an aspiring planner?
This is an exciting time for our profession. As an educator of future financial planners, the next generation joining us are bright, mature and have a great deal of intellectual curiosity.

The financial planning profession is constantly evolving and has become equal to other premiere certifications. There is still work to be done, but the CFP Board and FPA National are both working hard to develop our organization into a highly aligned profession better equipped to serve our community.

I am hearing time and time again from our members of how they are meeting their clients where they are and journeying with them as they pursue their life goals. As a professional organization, this is exactly what I would expect FPA of Middle Tennessee to do for our members…meet us where we are and help us to pursue our life goals.

Thank you to Dr. Williams for agreeing to be the first spotlight of the year. As part of FPA's "Year of You," we will highlight members each month throughout 2019. Please send suggestions for member spotlights to scott.sivley@fpamidtn.org.

MARCH KNOWLEDGE CIRCLE

by Brian Johnson, CFP®

The March topic is Employee Benefits. This session will help you best assist your clients with general benefit elections and executive benefit plans.

Join us as we explore topics like HSA & FSA utilization, deferred compensation, defined benefit plans (401k/403b/457), employee stock ownership plans (ESOPs), and Net Unrealized Appreciation (NUA). Your experience and questions will make this beneficial for all attending.

The first 12 to register and attend will receive a book on ESOPs!

Thursday 28 March
3:30 - 5:00 PM
The Casual Pint
110 Hillsboro Rd., #260
Franklin, TN 37064

RSVP HERE

Thank you to our gold partner!
Ready to become our partner?
Contact Danny Raube at
draube@shoemakerfinancial.com.

Thank you to our platinum partner!
To learn about the benefits of sponsorship, contact
Danny Raube at
draube@shoemakerfinancial.com.

FPA RETREAT 2019

Join the profession's best and brightest in La Jolla on May 6–9. FPA Retreat 2019 will be held at the Hilton La Jolla Torrey Pines Hotel in beautiful La Jolla, California.

FPA Retreat is truly unique in the world of professional events, offering the perfect setting for financial planning's top thinkers, trailblazers, and change-makers to work together to build the future of the profession.

Advanced registration discount ends March 8. Click on the image below to learn more and register

Making a Difference

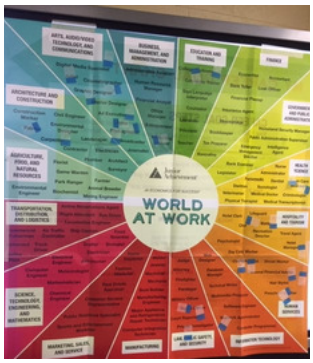
FPA + Junior Achievement

A Partnership for Our Future

by Kate Dore

Drifting from your comfort zone is often a good thing. It's the opportunity to take risks, learn, and grow. For me, teaching financial literacy to middle school students is a challenge. There is a constant fear of being boring, or worse — not actually making a difference.

Luckily, I've had the opposite experience at Jere Baxter Middle School Prep. Junior Achievement makes it easy. They provide everything for six one-hour interactive lessons on career, budgeting, credit, and more. The games and activities keep the students engaged. Schools across Middle Tennessee participate, so it is convenient to volunteer. My school is less than ten minutes from my office in East Nashville.



Junior Achievement of Middle Tennessee reaches over 30,000 students per year. I'm one of two FPA volunteers this semester. Let's aim to expand our chapter's involvement in the fall. Trust me- it's beyond rewarding to see students get fired up about money and their future careers. You may even discover financial planning's next emerging star.

Interest peaked? Please contact Bob Bolen at bob@unitedincome.com or 615.268.9531.

Junior Achievement of Middle Tennessee

CHUBB®

Thank you to our gold partner!

Want to reach our members? Contact Danny Raube at draube@shoemakerfinancial.com.

Volunteers are still needed for a "Day on the Hill" on Tuesday 26 March. The day is filled with opportunity to continue a two-way dialogue on issues that matter most to you.

You'll connect with your local legislators and state regulators to build important relationships that promote partnership and increase our influence.

FPA Advocacy seeks to advance and protect your profession by proactively seeking out those who vote on issues that affect your profession.

A pre-event training webinar will occur Thursday 14 March at 12:00 pm CDT. Webinar sign-in details will be provided to registrants closer to the scheduled date. Complimentary breakfast and additional training will kick-off the day.

Click Here to Register

2019 Member Local Survey

This is your chance to share your impressions on the array of chapter programming and services.

Thank you to those of you who have already taken the time to participate. In less than five minutes, your feedback can shape decisions on everything from meeting locations and topics to how funds are allocated for programming throughout the year.

To begin, click on the image below.

UPCOMING EVENTS

TN ADVOCACY DAY

Lend Your Voice . . . Make a Difference
Tuesday 26 March
8:00 AM - 2:00 PM
Breakfast and full training provided
Connect with your local representatives
Promote and protect your profession
Details follow after registration

REGISTER TODAY

MARCH KNOWLEDGE CIRCLE

Employee Benefits: What you need to know to assist your clients with general benefit elections and executive benefit plans

Thursday 28 March
3:30 - 5:00 PM
The Casual Pint
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Franklin, TN 37064

RSVP HERE

APRIL CHAPTER MEETING

Peter Lazaroff, CFA, CFP®
Co-CIO, Wealth Manager, PlanCorp Financial
"How to Improve Your Writing, Make Better Decisions, and Grow Your Business"

Wednesday 17 April
3:00 pm Networking
3:30 - 5:00 pm Chapter Meeting
Reception Follows on Terrace
TrustCore, Education Center, 1st Floor

RSVP HERE