SHARE THE WEALTH

GROWING YOUR PRACTICE WITH FPA OF MIDDLE TENNESSEE

THIS MONTH'S ISSUE
OCTOBER 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. This month, we gear up for the final major event of 2019 – our annual Symposium. At the tail end of a successful year (by nearly every metric), we are excited for the opportunity to provide maximum value to your practice in a full day.

We've had a record-setting year already for attendance at chapter events. Many chapters charge for chapter meetings and other events, but we are proud – and grateful for our corporate partners – to be able to keep our events free except modest pricing to cover expenses of the symposium. Now we're thinking of ways to focus our energy to improve what we have implemented. A 2020 calendar of events will come out soon, but for now, I ask you to think about which events you enjoy the most and what programming is most useful to your practice and professional development. Then, please share your ideas with leadership so we can make our efforts as relevant and enjoyable as possible for you.

As a group of practitioners seeking to improve our practices – as well as the industry as a whole – we hope to grow with you for the rest of 2019 and beyond. Our association exists to benefit your practice, so please share your thoughts on how we can add more value back to you. We hope you can use this edition of *Share the Wealth* as continued guidance on our ever-changing industry, and as always 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

JENNIFER HUNT, ATTORNEY-AT-LAW

Jennifer Hunt is a Tennessee licensed attorney who currently manages her own practice in Franklin. She provides comprehensive estate planning for individuals and families wishing to protect their valuable assets. Family has always played an important role in her life. By getting to know clients and their families on a highly personal level and discussing their hopes and dreams, she aims to provide families with the peace and comfort in knowing their loved ones will be provided for during life's unfortunate events.

Jennifer holds a Juris Doctorate from Vanderbilt University Law School. She currently is serving her second term on the Board of Directors for FPA Middle Tennessee as chair of the Allied Initiatives Committee.

Why did you get involved with FPA? Throughout my career, I have worked closely with many financial advisors to assist clients in creating an estate plan. There are many synergies between estate planning and financial planning. I have found that the best way to serve clients is to have the attorney and financial advisor working together to ensure the clients' estate plan accomplishes all their goals. I got involved with the FPA to meet financial planners and understand better ways I could work with them to serve clients.

How have you benefited from being an FPA member? The FPA has expanded my professional community. The FPA offers many opportunities to network with the members by offering quarterly chapter meetings and more intimate events such as Knowledge Circle and Next Gen. I have enjoyed meeting financial planners and other allied professionals who truly care about their clients. I also wanted to learn invaluable information about financial planning to collaborate with financial planners on a deeper level and better understand the perspective of advisors and clients.

What words of encouragement would you give an aspiring planner? As a young professional, it is imperative to find a mentor. Seek out seasoned professionals in your industry and ask about their experience in the industry and for their advice.
Also, networking with other professionals in your industry and allied professionals will prove invaluable. You will not only learn from a great deal from other professionals, but will also get your name out there to help build your book of business.

Why do you choose to serve on the Board?
I was approached by Nathan Greene a couple of year ago and invited to serve. The board was in a state of transition at the time and I wanted to be involved during this exciting time. Over the past few years, FPA has made significant changes through the great leadership. The FPA is set up for future success and growth. As the Chair of the Allied Initiative Committee, I want to strengthen relationships between allied professional associations and the FPA through programming collaboration. I also seek facilitate opportunities for FPA members to engage with and leverage relationships with professionals in industries complementary to the financial planning profession.

A special thank you to Director Hunt for sharing her story. As part of FPA's "Year of You," we will highlight members each month throughout 2019. Please send ideas for member spotlights to scott.sivley@fpamidtn.org.

This year's symposium brings together a dynamic collection of nationally recognized thought-leaders and local experts. They will share practice tips, industry insights, and marketplace realities. Your clients will be glad you attended and so will you! You can read more online, but here's a brief glimpse of each.

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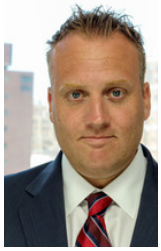

***Keynote:* Joshua Brown, Let Me Save You Some Time**
Josh Brown is the CEO of Ritholtz Wealth Management. He is also known as "The Reformed Broker." He and his firm help people align their investments with their financial goals and manage portfolios for them. This presentation provides financial service professionals a how-to on guiding clients through hyperbolic news cycles, remaining an asset for clients in today's technology/information age, and coaching clients to mitigate decision reversal risk / behavioral mistakes.

Session 1: Heather Piper, Making Cents Out of Divorce
Heather Piper is an attorney and one of two founding partners of Piper McCracken, PLLC. Heather concentrates her family law practice on divorce actions involving large estates. Her clients are typically professionals and her cases frequently involve complex valuation, custody, and division issues. This presentation will focus on the financial component of divorce and how to help your client best prepare for, engage in, and recover from divorce with confidence and resolve.

Session 2: Adam Peck, Not a Fad! ESG Investing Is Here to Stay
Adam Peck is Founder & Chief Investment Officer for Riverwater Partners. His studies in International Relations and Environmental Sciences kindled his interest in socially responsible living and socially responsible investing. He'll define ESG Investing and look into the trends associated with ESG investing, where demand is coming from, and how corporations are responding to that demand. Finally, he'll delve into the process of becoming and the benefits of achieving certification as a B Corp.

Session 4: Ashley Nabors RetireReadyTN – TN's Retirement Program for Public Employees
Ashley Nabors is the Assistant Treasurer of Financial Empowerment for the Tennessee Department of Treasury. Join us to learn about the retirement programs available to public employees and the steps the Treasury Department takes to help ensure the retirement readiness of 200,000+ state and higher education employees, K-12 teachers and participating local government employees.

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PROGRAMMING RECAP

It has been a fun and thought-provoking year at our meetings and programs. We'll round out the year in each of the next three editions by taking a look at some of the best highlights from 2019.

Bill Spitz kicked off the year with an insightful look into the future. We had a packed house for each chapter meeting this year at TrustCore.

To the left, Lindsay Youngbauer and Samantha Dwyer putt for glory during NexGen's Summer Mixer. To the right, NexGen'ers get to know each other.

Knowledge Circles have been a great way for members and guests to learn more with each other. Topics change each month.

Members from across the state joined in March for a day of impact and storytelling at our 2019 Day on the Hill.

This year's estate planning conference had attendees on the edge of their seats. Sponsors make this a free event for members. Just another example of the partnerships benfitting all.

For more information and to get involved contact us at 615.436.2216 or scott.sivley@fpamidtn.org

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Executive Committee 2020

Congratulations to Director Kevin Mitchell on his election to the position of President-elect of the Board for 2020 and to Danny Raube for his election to continue as Secretary of the Board for 2020-2021.

2020 Executive Officers

Chairman: Nathan Greene, CFP®
President: Dr. Burton Williams, CFP®
President-Elect: Kevin Mitchell, CFP®
Treasurer – Dan Killian, CFP®
Secretary: Danny Raube

As previously announced, the additional nominees for the Board of Directors for 2020 are:
Jennifer Hunt, Attorney-at-Law
William Liles, CFA, CFP®, CIMA
Arturo Neto, CFA, CPWA
Craig Reed, CFA, CFP®, CIMA
Lindsay Youngbauer, CFP®

They will be voted on at the annual meeting on 16 Oct 2019 at approximately 1:00 PM

Collegiate Day 2019

How often have you thought you wish you known that before you started your career? Did you know part of your professional commitment is to cultivate the next generation? Did you know your local chapter actively works to provide meaningful life-long professional development?

Those were a few of the questions we asked ourselves when planning 2019. One of the results was Collegiate Day. The inaugural event, led by professional development chair, Craig Reed, happened on Friday 27 September at TrustCore.

The event included three-panel discussions. They were 1) potential careers in financial planning, 2) the educational path of a financial planner, and 3) getting that first job. Plus, attendees participated in a mock interview.

The event was a partnership between local universities and FPA of Middle TN and provided students and member volunteers an excellent opportunity to learn and share what they've learned. We will build on this to continue meeting members and future members' needs and our responsibility to the profession.

Pictured here left to right: Suzanne Sager of Lipscomb, Matt Bader of TrustCore, and Dr. Dong Nyonna of Austin Peay discuss credentials and assessing educational programs to earn those credentials.

Follow FPA Legislative Advocacy on Twitter

Advocacy's brand new @AdvocacyFPA Twitter account is live!

Follow @AdvocacyFPA for news, events, and education about advocacy at FPA.

First up? Learn how to get free CFP CE while getting compliance insight into RegBi and the CFP Code and Standards.

You can follow us and access our @AdvocacyFPA Twitter HERE.

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Practice Corner

If you're an advisor traditionally focused on high-net-worth clients, the endowment and foundation space can be a natural area for growth. With more than 1.3 million 501(c)(3) organizations in existence, there are plenty of non-profits that could benefit from working with financial advisors. Watch our webinar replay where Nicholas Cintineo shares specific examples of how you can grow your practice as a valuable resource to non-profits.

Watch Now

Thank you to our local Manning & Napier representative, Deanna F. Perry CIMA®, AIF® for offering this month's practice corner. You may contact her at 585.406.5565 or dperry@manning-napier.com

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Member Announcements

Do you have a new job?
Searching to fill a position?
Want to share a new honor?

Have something useful for fellow members?

We want to know. Email fpamidtn@gmail.com.

Looking for office space? Here's a link to a property that is centrally located to potential clients. Click here for details.

Thank you to Doug O'Rear and Bob Bolen for representing the Chapter at the WKU Symposium on Sept. 20.

UPCOMING EVENTS

2 Hours Golf + Breakfast + Lunch
4 Hours CE Approved for CFPs, CPAs, and Licensed TN Insurance Agents

Click Here to Register

Heather Piper
Making "Cents" Out of Divorce

Keynote Speaker
Josh Brown, "The Reformed Broker"
Let Me Save You Some Time

Adam Peck
Not a Fad! ESG Investing Is Here to Stay

Ashley Nabors
TN's Retirement Program for Public Employees

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