SHARE THE WEALTH

GROWING YOUR PRACTICE WITH FPA OF MIDDLE TENNESSEE

THIS MONTH'S ISSUE
SEPTEMBER 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, look forward to a promising symposium in October. Much energy has gone into making this symposium one of our most impactful events ever, so be sure to read further.

While we're excited about the last few events on our calendar, our leadership is already planning for 2020, and we're still looking for thought-leaders and influencers to help us deliver top-tier value to our Middle Tennessee members. For those of you who didn't apply for our Board of Directors (and even for those who did), we have a number of committees in place who will be instrumental in designing and executing on new ideas and making sure we're adding more-and-more value to the member experience. If you've ever been interested in facilitating a positive experience and helping elevate your industry, this is a wonderful opportunity to have maximum impact with relatively modest time-commitment.

For those of you who are interested in committee-service, please read further! Otherwise, you are always welcome to reach out to me directly. 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. We hope you can use this edition of *Share the Wealth for* 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

DANNY RAUBE

Danny is a co-founder of Financial Identity Advisors where he serves as Vice-President and Regional Leader. He is serving his second term on the FPA of the Middle Tennessee Board of Directors and currently serves as Secretary of the Board. Danny feels his mission is educating his clients in such a way that their financial security is paramount.

Why did you get involved with FPA?
I wanted to give back to the industry that has provided me with so many opportunities.

How have you benefited from being an FPA member?
There are many benefits to being a member of FPA, but I have enjoyed making connections with allied professionals, brainstorming with other financial planners on best practices, learning invaluable information at chapter meetings, Knowledge Circles, the symposium, and taking advantage of the member benefits like group disability, etc.

Why do you choose to serve on the Board?
I was approached a few years ago by Michael Wallin and Jerry Moore and invited to serve. I saw the need that FPA of Middle TN had to grow sponsorships in order to accomplish the goals of the Chapter. I also noticed the Board was in a transition phase and I was excited to be involved in that transition. I've always been of the mindset that if you want to see change and improvements you should be part of the solution. The Chapter has had some amazing board members over the years, and I wanted to honor what those before me have done and build upon that legacy. We have a very vibrant board today as we have made some great changes, which I believe set us up for tremendous growth and success today and for the future. FPA of Middle TN is in a good place and I'm excited to be a small part of what is happening.

What words of encouragement would you give an aspiring planner? Never stop being a student of your profession. Seek out successful financial planners and ask them for guidance. This industry is a tough industry in which to get started, especially fresh out of college. Partnering with a senior advisor and "learning the ropes" is critical. Finally, never forget that what we do makes a difference in the lives of the clients we are so blessed to serve. This is a noble profession.

A special thank you to Secretary Raube for sharing his 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.

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SEPTEMBER KNOWLEDGE CIRCLE
ESTATE PLANNING

Our overview discussion will touch on partnering with experts and broaching the subjects of death and incapacitation to the array of estate planning vehicles and ongoing estate planning client checkups to any topics you want to explore.

Please join the conversation to share your experience and learn with us.

Tuesday 24 September
3:30 - 5:00 PM
Stay Golden
2934 Sidco Drive
Nashville, TN 37204

RSVP HERE

MANNING & NAPIER®

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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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4 Hours CE Approved
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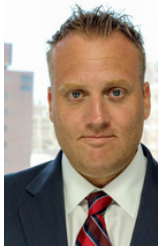

***Keynote:* Joshua Brown, Let Me Save You Some Time**
Josh Brown is the CEO of Ritholtz Wealth Management. He is also known as "The Reformed Broker." He and his firm help people align their investments with their financial goals and manage portfolios for them. This presentation provides financial service 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.

REGISTER HERE

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GET INVOLVED

Serving your chapter and fellow members is a great way to expand your practice and promote the profession. There are a number of ways for you to get involved. There's no better time than now to be thinking of your service for 2020. Here's a list of ways to lend your time and knowledge to your chapter.

Member Engagement Committee
Help promote stronger community and professional development for members at all stages of their career from college to retirement.
Recognition & Hospitality
Professional Development
Diversity & Inclusion Initiatives
NexGen
Pro Bono

Programs + Education Committee
This committee conceptualizes superior, coordinated educational programming for members throughout the year.
Chapter Meetings
Knowledge Circles
Symposium

Public Affairs & Awareness Committee
Promote the Chapter's good works and the value of the profession to current and future members and our broader community.
Advocacy
Allied Cooperative Initiatives
Corporate Partnerships
Media Relations

Planning & Assessment Committee
This committee establishes guidelines and procedures for reviewing the work of the organization against its annual strategic plan, operating procedures and guidelines, and regulatory framework to ensure its optimal functioning.
Compliance & Audit:
Finance & Adminsitration
Strategic Planning

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

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at danny@teamfia.com.

2020 Board of Directors Slate Announcement

The nomination committee of the Board of Directors, in accordance with the Chapter's bylaws, officially offers its nominations for the 2020 FPA of Middle Tennessee Board of Directors. The official vote of the membership will occur during the annual meeting on 16 Oct 2019 at approximately 1:00 PM. The nominees are:

Jennifer Hunt, Attorney-at-Law
William Liles, CFA, CFP®, CIMA
Kevin Mitchell, CFP®
Arturo Neto, CFA, CPWA
Danny Raube
Craig Reed, CFA, CFP®, CIMA
Lindsay Youngbauer, CFP®

2020 Executive Officers
Chairman: Nathan Greene, CFP®
President: Dr. Burton Williams, CFP®
President-Elect: *Open to any current or former director in good standing**
Treasurer – Dan Killian, CFP®
Secretary: *Open to any member in good standing**

* Elections to take place during September. Interested persons should contact Scott Sivley at scott.sivley@fpamidtn.org.

Junior Achievement
Fall Volunteer Opportunities

A want versus a need. How to balance a checkbook. Don't you wish that someone had taught you those things as you were growing up? Now there is someone. YOU.

All we need is your enthusiasm, life experience, and a willingness to teach children about how you took chances and shot for the stars. Junior Achievement provides the training, curriculum, and a classroom ready to meet you.

K-12 Traditional Classroom: *5-7 Weeks (depending on grade level), one hour per week*
Volunteers from the community make weekly visits to a school to present short lessons and lead activities for elementary, middle or high school students.
Volunteers are connected with their assigned teacher prior to beginning their weekly visits and work directly with the teacher to coordinate the schedule. You'll lead one lesson per visit (~45 minutes).

JA in a Day: *One day, all activities*
JA in a Day places you in the classroom to teach the entire JA curriculum in an exciting one-day event. You'll travel to your assigned elementary or middle school on the selected date, and arrive with all materials needed for the class (provided by JA). You'll teach JA's curriculum in your assigned class for four to five hours. For more information, contact Bob Bolen at bob@unitedincome.com

TNSTARS COLLEGE SAVINGS 529 PROGRAM
ABLE TN

Programs of the Tennessee Department of Treasury
David H. Lillard, Jr., State Treasurer

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FREE CE WEBINAR
offered by
Innovative Portfolios

Using Option Strategies for Financial Planning Solutions
September 10, 2019
12:00 - 1:00 PM
1 Hour CE Approved for CFP® and TN Insurance

Financial Planning involves a comprehensive view of a client's life, circumstances, and future goals.

Identifying potential planning issues is crucial in the financial planning process and key to the overall success of the client's future, not to mention the success of the client/advisor relationship.

This presentation focuses on helping investment advisors identify financial planning challenges within investment portfolios and offering potential solutions through option-based strategies. Three common financial planning issues are discussed (concentrated position, idle portfolio of low cost basis stocks, and portfolio rebalancing) followed by details of how appropriately-applied option strategies can be effective tools in portfolio management and financial planning.

Key Learning Objectives:
1. How to identify financial planning issues within investment portfolios

2. Basics of understanding options

3. How to utilize option strategies to create desired outcomes for their clients.

Register Today

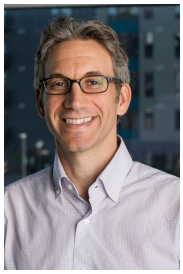
UPCOMING EVENTS

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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Fidelity INVESTMENTS

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Triumph Bank

William Blair