FPA
THE FINANCIAL PLANNING ASSOCIATION
FINANCIAL PLANNING ASSOCIATION OF MID-OREGON

Planning News

Volume 4 Issue 8
November 2005

FPA OF MID-OREGON MONTHLY CHAPTER MEETING

TUESDAY, NOVEMBER 15, 2005

Lunch 12:30pm

First Session

1:00-2:00

FPA Member $25
Non-Member $40
(cost includes lunch)

Lunch only FPA member $15.00
each hour CE $10
Lunch only Non-Member $20
each hour CE $20

Downtown Athletic Club
999 Willamette St.,
Eugene, OR 97401

RSVP to:
Lkats@yahoo.com
or 541.284.9855

"MARKET UPDATE; WHAT'S A PERSON TO THINK?"

Craig Strausser
American Funds

Craig will be offering great tips on how to be the best advisor you can be. Please come join us!

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By the time you receive this, Tish Hathaway, incoming Program co-chair 2006 and David Hinson, our new treasurer 2006, will be winging their way to the national FPA Leadership Conference in Denver. We look forward to their reports on the chapter and practice-based ideas they'll have learned. This will bring to eleven the number of current and past board members who have gained the advantage of the stellar program national FPA provides. Bon voyage!

Well I guess we just can't stop the fun! The inimitable Craig Strausser, with American Funds, will be our featured speaker for this month's meeting on November 15, the third Tuesday, as usual. Craig always brings good information and excellent ideas on how to be the very best advisor you know how to be. I always learn from him.

December is shaping up to be a very interesting time for many lucky members. Since we're having Mick Endersbe, of the College Planning University™, from Lakeville, MN, a renowned expert in college planning strategies, the board has decided to make a day of it. Our chapter goals include reaching out to serve the public while providing very real benefit to our members for being part of the card-carrying community of those who practice and support the financial planning process. So we're having an evening seminar open to the public, at which Mick will speak on "The Value of a College Education and the Reality of Paying for It".
(*See accompanying flyer*)

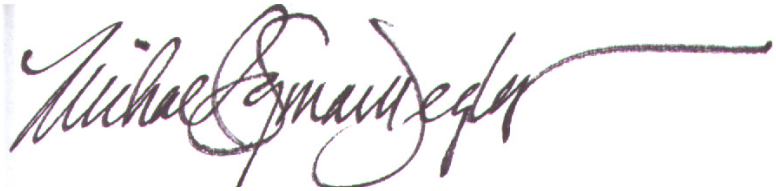
The beauty of the deal is that we've been doing some checking with the 9 high schools in the area, and we're going to be able to do a commercial and leave our brochures, encouraging further education on college planning at each of their senior night or financial aid nights. They are scheduled throughout November 15 through our meeting on December 13. We'll need volunteer members to make those rounds with the concurrent sessions that occur the week of December 5th so we can get to them all.

...Continued on Page 3

We plan to print a thousand of the brochures about Nick's visit and would like to have help from members with that printing. I need at least 10, and no more than 15, members who want to have their name, address, e-mail and phone on the back of the pamphlet and in the hands of those thousand desperate-for-planning-help parents to contact me with the promise of a $30 check to help with the color printing. So the first dozen (Tish, Laurie and I are already in it for the ride) of you will have the opportunity to have the work of your chapter work directly to the benefit of your practice! Please contact me by Monday morning, Nov. 7, as we will begin printing that day. You can email me at Michael@syman-degler.com or call 541.345.9681.

Perhaps you've seen the Register-Guard ads for the FREE 529 College Savings Seminar held around the state next week, and here at the Hilton on Tuesday evening, November 8. I've spoken to Michael Parker, at the OR Treasurer's office, who's putting this show on, and he wants to work with us over the year and especially at our December show to promote saving with a planner. I'm reaching out to MFS and Oppenheimer for help with sponsoring Mick Endersbe's expenses, and hope to be able to create some alliances that will benefit us, the chapter, and our profession.

All you gotta do is join up and hang on! Please contact me with offers to help.
See you on the 15th!



Michael Syman-Degler, CLU, CFP®
President, Mid-Oregon Chapter

ATTEND A FREE 529 COLLEGE SAVINGS SEMINAR

Guest Speakers

Bruce Harrington, MFS Investment Management
Michael Parker, Oregon 529 College Savings Network

Dates and Locations

November 7, The Westin Portland, Portland, OR
November 8, Hilton Eugene & Conference Center, Eugene, OR
November 9, Red Lion Hotel, Medford, OR
November 10, The River House, Bend, OR

Time

For all locations: 6:30 p.m. To 8:00 p.m.
Dinner will be served at 6:30 p.m.

Call 503-373-1903
or visit oregon529network.com to reserve your seat today.

FPA of Mid-Oregon 2005 Calendar of Upcoming Events

November 15
Craig Strausser, American Funds

December 13
Mick Endersbe; "Client-Centered College Planning"

2005 Meeting Dates

November-15
December-13
(December's meeting is one week early due to the holiday)

NEW REQUIREMENT FOR CFP BOARD REGISTERED CE SPONSORS:

Effective January 1, 2006, the CFP Board will require all CE Sponsors to report attendee lists electronically. That means that for those of you that come to our chapter meetings and want CEs, this will be a much easier process for you.

Here is what we will need from you in order to make this work:

- **Social Security Number OR CFP Registrant ID**
- **Last name, first name, middle initial**

That's it! We'll keep your information in a database so that you only need give it to us once. No CE Certificates will need to be issued any longer. You will now go online to check the status of your CE hours. Within 2 business days of each meeting, your CE hours will be posted. Please visit: www.cfp.net for more information.

Email Lori Kats with your info from above: Lkats@yahoo.com

***Golden Circle Sponsors** are greatly appreciated annual supporters of the FPA of Mid-Oregon.*
Thank You for your continued support of the Financial Planning Profession!

KELMOORE INVESTMENT COMPANY, INC.
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HERSHNER HUNTER ANDREWS NEILL & SMITH, LLP
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PACIFIC LIFE

DOWNTOWN ATHLETIC CLUB AND CONFERENCE CENTER

UPCOMING EVENTS AT THE DOWNTOWN ATHLETIC CLUB

Jazz begins at 8:00 pm to 11:00 every Saturday evening in the AX BILLY GRILL SPORTS BAR on the third floor of the Downtown Athletic Club at 999 Willamette Street.

No Cover Charge, the public is welcome!

- **Saturday November 12, 2005** *Group Therapy*
- **Saturday November 19. 2005** *Carl Woideck*
- **Saturday November 26, 2005** *No Jazz*

THIRD THURSDAY TASTING

Thursday, November 17, 2005, from 5:30 to 7:00 p.m. in the Ax Billy Sports Bar, we'll welcome Bill Huggins from McClaskeys Wine featuring selections from Maryhill Vineyards from Columbia Valley, Washington. *Free*
21 and up.

Ax Billy Grill and Sports Bar will be closed on Thursday, November 24, 2005, and re-open for dinner at 5:00 p.m. on Friday, November 25. Come watch football games on the big screen tv!

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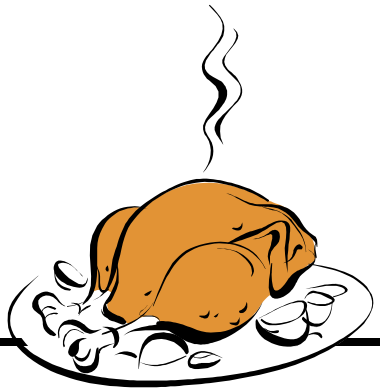

THE FINANCIAL PLANNING ASSOCIATION OF MID-OREGON

MISSION STATEMENT

To provide an educational and networking forum for Financial Service Professionals that increases public awareness of the benefits of the financial planning process and promotes high ethical standards.

BECOME A MEMBER TODAY!

FPA of Mid Oregon
P.O. Box 1452
Eugene, OR 97440
Voicemail: 541.284.9855
Email: Lkats@yahoo.com
www.financialplanningmid-oregon.org

Mission Statement Financial Planning Association of Mid-Oregon

Provide a forum for financial service professionals to engage in the following activities for the ultimate benefit of the consumer.

- Education and professional development
- Promote high ethical standards of practice
- Network with professionals In related disciplines
- Encourage and promote public awareness of benefits and planning

BECOME A MEMBER TODAY!

Chapter Meeting Information

Chapter meetings are held January through December, excluding June, July and August, with a Symposium in May.

Monthly meetings include a buffet lunch, networking opportunities with allied professionals and a program designed to provide education and professional development.

Parking: Parking is available and validated for the Overpark located on 10th & Oak St.

Guest Policy: You are encouraged to bring a guest to a meeting. First time guests are free. Please include the name of guest when registering.

Cancellations: Cancellations must be no later than 24 hours before meeting date. Please register no later than 24 hours prior to the meeting date.

To register, call FPA voicemail at **541.284.9855** or email **Lkats@yahoo.com**

Place Your Ad Here!

Looking for Professional contact in the Lane County Area?
Place your advertisement in the Mid-Oregon Planning News
and reach a multitude of professionals in one easy step!

Mid-Oregon Planning News monthly advertising rates:

Business card $25

Quarter Page $80

Half Page $110

Full Page $180

Run your ad for consecutive months and receive a volume discount!

Email Co-Executive Directors Lori Kats and Linda Barba at Lkats@yahoo.com or 541.284.9855for further information.

Membership in the FPA....

A valuable asset

The FPA is a dynamic organization able to offer its members many benefits. As a member of the FPA, you will gain access to a combination of the best networking opportunities, peer reviewed publications, continuing education, practice management tools, and career development support. FPA is your link to the best resources available to help you succeed as a professional in the financial planning community.

For information regarding membership to the FPA please contact: Membership Director: David Bonebrake 541.868.3800 or Co-Executive Directors Lori Kats or Linda Barba at LKats@yahoo.com or 541.284.9855.

Applications are also available at our monthly Chapter Meetings held at the Downtown Athletic Club. Additional information regarding the FPA can be found at our website, www.financialplanningmid-oregon.org, with links available to the National Foundation.