THE FINANCIAL PLANNING ASSOCIATION

FINANCIAL PLANNING ASSOCIATION OF MID-OREGON

Planning News

Volume 10 Issue 4

November 2010

FPA OF MID-OREGON QUARTERLY CHAPTER MEETING

TUESDAY, NOVEMBER 16TH, 2010

Afternoon Program 1:00pm-4:00pm

Lunch 12:30pm

2 Hrs OREGON INSURANCE & **2 Hrs** CFP CE

Leveraging Social Styles

John Harrell ~ Russell Investments

John Harrell is a two time top medalist from the prestigious Buckley School of Public Speaking. His presentation skills, impact and presence are dramatic and impactful. He knows of what he speaks, and the results for his clients are powerful. In this presentation, John will discuss client social styles - how to identify, understand and adapt to those styles. This presentation is not just appropriate for Financial Planning representatives, but also for all experts in a service role like CPAs, Attorneys and other. The impact of this presentation will be a dramatic improvement in client satisfaction and taking your business to the next level.

There Couldn't Be A Better Time: Charitable Gift Annuities

Sara Brandt ~ Oregon Community Foundation

Sara Brandt brings 28 years of professional experience in development, grant making, and financial services to today's program. As Charitable Gift Planner for The Oregon Community Foundation's Southern Willamette Valley region since 2002, she assists individuals, organizations, and their professional advisors in establishing charitable funds with OCF, and she carries out development outreach programs for the region. Brandt was client services and marketing director with Journey Tree Financial Planning & Investments of Eugene from 1998-2002 and a University of Oregon Development Officer for nine years. From 1982-1988, Sara was performing arts program director for Mid-America Arts Alliance, a six-state regional arts organization based in Kansas City, Missouri. She has served as a grant panelist and site visitor for the Lila Wallace/Readers Digest Foundation, the National Endowment for the Arts, and the state arts agencies of Kansas, Nebraska, and Oregon. She is a past president of the Professional Women's Forum in Eugene, and a member of the Eugene/Springfield Estate Planning Council and the Financial Planning Association/Mid-Oregon Chapter. Her myriad volunteer activities focus on the arts and K-12 public education.

David Wescott ~ Oregon Community Foundation

Active in local and national professional development associations and affiliated groups, such as CASE, NCPG, ADNET and the Council on Foundations; have presented papers at the National Committee on Planned Giving conferences; have provided numerous consulting workshops for colleges and foundations around the country, and frequently presents continuing education sessions for attorneys, accountants and other professional advisors on matters related to charitable giving. Co-developed a software program for endowment management with Datatel, Inc, a leading national provider of development and financial software for colleges and foundations.

Credit and Investment Planning

Chris Martin~ Pentagon Federal Credit Union

Chris Martin is currently a Manager of Service Center Operations in the Eugene Service Center for the Pentagon Federal Credit Union. He graduated from the University of Oregon in 2005 and has worked for Pentagon Federal for the past 8 years. During his time at the credit union, he spent 3 years overseas managing their branch at Fort Buchanan in Puerto Rico. Since returning to the states in 2008, Chris has been responsible for loan officer training as well as day-to-day management of operations in the in the Eugene Service Center. He has been married for 6 years to his wife Christina, a graduate student at the University of Oregon, and is currently pursuing his M.B.A. Pentagon Federal Credit Union is a $14 billion, 950,000 member defense-related credit union, offering a full spectrum of market-leading loan and deposit products to their military and civilian membership. They were awarded 2010 Credit Union of the Year award from the National Association of Federal Credit Union and currently ranked #14 on Oregon's 100 Best Nonprofits to Work For.

Pricing for November Meeting

Lunch ~ 12:30 pm

"Short Program"
Lunch and 1st Hr Presentation
$25.00

2 Hrs CFP CE
2 Hrs OREGON INSURANCE CE
1:00 ~ 4:00 pm
FPA Member ~ $60
Non-Member~$65
1st Time Guest~ $15
If wanting CE ~$65

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

RSVP to: fpamidoregon@yahoo.com

Or Call 541 284-9855

QUARTERLY MEETING FORMAT

Each program will offer 3 hrs CFP CE, Oregon Insurance CE. When it applies

Mark your calendars

2011 Chapter Meeting Schedule

January 25th, 2011

March 15th, 2011

FPA Social

December 8th 2010

For details contact Linda at fpamidoregon@yahoo.com

2011 Symposium

TBA—sometime in MAY

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Tish Hathaway

FPA of Mid-Oregon
2010 President
Hathaway Financial Services

Greetings form

Our Chapter President

This will be my last letter as president of the Mid-Oregon FPA, as I prepare to hand over the reigns to in-coming president Craig Weicker. As a board member, Craig has proven to be an energetic and enthusiastic promoter of the value of financial planning. With his great passion and strong leadership skills, I believe he will lead our group in exciting new directions! Please join me in welcoming Craig to this position, and offer your support to him.

Many thanks to Craig for successfully launching our first ever Financial Planning Day event this past Saturday, Oct. 23rd at the Sheldon Community Center. With the partnership of the CFP® Board, FPA National, the Foundation for Financial Planning, and the U.S. Conference of Mayors, this event brought free and expert financial planning services to over 101 participants in the form of one-on-one pro-bono advice, as well as group presentations on general wide-interest financial planning topics.Preliminary review of all evaluations - 100% stated that they would recommend this event and that they Strongly Agreed that they were given useful and helpful information and that the volunteers were knowledgeable and helpful.

We are proud of our chapter's participation in this important event, and hope to continue it annually. Please extend your time in support of this event next year!

Our next chapter meeting will be Tuesday, November 16that the Downtown Athletic Club. We are very excited to have John Harrell, a two time top medalist from the prestigious Buckley School of Public Speaking, presenting on how to identify, understand, and adapt to client social styles; our very own Sara Brandt and David Westcott from OCF updating us on charitable gift annuities; and Chris Martin from Pentagon Federal Credit Union on all things credit, establishing it, maintaining it, and what to do when it goes bad. Come for the first hour for only $25, or stay for the day and earn CFP® and insurance CE for only $60. Don't forget to bring a guest; first time guests are welcome at our meetings for only $15.

Our next social is December 8th at the 5th Street Market Lavelle Bistro. John Harrell, from Russell Investments will be our sponsor for this event. Come welcome John and spread some holiday cheer with us.

For those of you who are considering membership in our chapter, go to http://www.fpanet.org/Membership/Individual/FinancialPlanner/ to see the many values membership brings you.

Thank you for your continued membership and see you in November!

Tish Hathaway, CFP®

FPA of Mid-Oregon 2010-2011

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!

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The Oregon Community Foundation
Here for Oregon. Here for Good.

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Money Tree Software™
"Making Good Planners Better"
www.moneytree.com

Prudential

OHSU
Oregon Health & Science University Foundation

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Important Notice for CFPs needing CEs!!!

Now that we must submit all CFP CEs electronically, all you need to do is go to the CFP website to add the courses you need for your CE requirement to your account. However, people have been entering our chapter's name in different ways and you won't find any classes unless you enter it the way the CFP Board has us listed.

Please follow these steps:

1) Go to www.cfp.net
2) Login
3) Select "My CFP Certification" tab
4) Select "View/Reports CE"
5) Select “Report CE”
6) Go to “Sponsor Search” - enter FPA
7) Select “FPA—Mid-Oregon
8) Then select the course. This will post it to the CFP’s class summary.
9) Repeat this exercise for other courses taken by this association.

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www.fpanet.org/Chapters/MidOregon/

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 on a quarterly basic, January ~ March September, ~ November 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 Over park located on 10th & Oak St.

Guest Policy: You are encouraged to bring a guest to a meeting. First time guests are $15.00 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.

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: Executive Director - Linda Barba at fpamidoregon@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, http://www.fpanet.org/Chapters/MidOregon/

with links available to the National Foundation.