

Eugene Financial Planning Day - 23 October, 2010



The Heart of Financial Planning™

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FOR IMMEDIATE RELEASE

4 November, 2010

The First "Eugene Financial Planning Day", a joint effort from the City of Eugene & The Financial Planning Association of Mid-Oregon (FPA of Mid-Oregon), is a success and helps a lot of people in need.

On Saturday, October 23, 2010, the City of Eugene joined with the Financial Planning Association of Mid-Oregon (FPA of Mid-Oregon), Certified Financial Planner Board of Standards, Foundation for Financial Planning, and the U.S. Conference of Mayors to provide a free financial planning day for the people of our community. The event was a big success, as the attendees, anecdotes, volunteer advisors and Mayor Kitty Piercy wrote in their own words (see below):



Volunteer advisor's and attendees one-on-ones.

SUPPORTIVE EVENT EVALUATION:

A majority of attendees completed an evaluation form following the event. After a detailed review of the evaluations, nearly all attendees stated that they would recommend this event to a friend or family member and stated that they either Strongly Agreed or Agreed that the volunteer financial advisor was knowledgeable and helpful, that the information was clear and easy to follow and they were given useful and helpful information.

FROM MAYOR KITTY PIERCY:

The planners volunteered their time and did not take any information nor sell any products. This was a simple and effective good will gesture that meant a lot to people in need. They have offered some ongoing volunteer work to some of our local non-profits. We are so fortunate to have such caring people... Another good day in Eugene.



Mayor Kitty Piercy Keynote Address.

ATTENDEE FEEDBACK:

FOR THE ENTIRE EVENT:

After this talk, I will be able to get my credit card down

EXCELLENT JOB!!. If not already done, please, please, please educate our youth - please offer this program to community more than once a year

IT WAS GREAT!

Thank you so much for the Free Financial Planning Day - it was a great resource and a wonderful service to the people of Lane County!

I was absolutely delighted with the one-one-one information. Thank you for providing this event. It's of tremendous help during these times

GREAT JOB. WORTH WHILE.

It's exactly right!

One-on-ones were extremely helpful!

It was a great event - I felt comfortable with all of the presenters and planners. I hope you have it next year - I will have more and better questions since attending this year's

Went to "Real World Retirement Planning" workshop and "20 Tips for Small Investors" - both were great!!!

Overall evaluation for the day - outstanding!! The best thing I've done for myself all year!! Thank you

Thank you! Very Helpful - Great as a kick -start to retirement planning!

Worked great for me

.... AND FOR THE WORKSHOPS:

Great job! Thank you for doing this presentation and sharing your knowledge!

The Advisor is outstanding! Really appreciated her ability to explain terms in laymen's language.



Attendees in a Workshop at the event.

FROM THE VOLUNTEER ADVISORS & ANECDOTES:

Financial Planning Day was a huge success for both the attendees and the planners. I was struck by one couple's desire to work with a professional but afraid to know who they could trust.

Trust is a key issue facing the financial planning and investment advisory field. This event made a huge step in the right direction. Everyone I spoke to felt much more confident after discussing their issues and getting unbiased advice. I believe we made a difference in helping them trust our profession again.

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All the people I met with had genuine concerns, but one stuck out because she was very scared of the "sales practices" of "advisors" she'd met with in the past. It really highlighted the need for taking the doctor-like approach that I feel is needed when discussing financial issues. It felt great giving her completely unbiased advice on her situation and she was so thankful at the end.

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All were very receptive to my advice. I walked away with the feeling of how much the public needs our services. They are scared and confused, frozen in their tracks. I had one lady that wanted advice re: buying vs. renting. However she had bigger issues of health concerns, ability to continue working because of this, and how to pay for medical expenses if she lost insurance at work.

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Great format where people were able to attend formal classes and were able to visit with several planners to get questions answered. People came really hungry for knowledge and were very appreciative.

One man said he got more out of the one on one sessions today than he had from years of reading. He left with a plan of action that he was confident he could put into place. Another couple had some twists and turns in life with health and other issues and had a paradigm change in how to utilize their budget in a more forward life planning way. They leaped from the 1, 3, 5 and 10 year plans and budgets at work to doing the same at home.

I left a better person having learned from attendees and planners alike knowing that others were encouraged and leaving with focus, energy and action plans for a better financial future.

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One young couple who attended and went to two presentations and met with me were really trying to get a handle on how to buy a house in 5 years. They are going about it the right way and asking great questions, they will succeed.

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One young couple came to my table after attending the budgeting workshop. They said, "That was really great and gave us Step 1. What I want to know is, what is Step 2 and Step 3? What do we do after our debts are paid off in a year?" I shared with them two concepts -- a hierarchy of needs from basic protection and savings to retirement planning and wealth accumulation (and beyond), and then a savings model for near-term, mid-term, and long-term buckets of money. They were thrilled. "This is exactly what we came here for!"

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The first couple that I met with made the most impact and a great start to the morning. They finally paid off all their debts and now wanted help saving for retirement. They thought they could afford to put \$300.00 away and I walked them through their options. They couldn't thank me enough that I spent time with them.

The Eugene Financial Planning Day Steering Committee offers a Special Thanks to:
City of Eugene - Mayor Kitty Piercy, Sheldon Community Center (City of Eugene) Facility and Staff, Lane Transit District (LTD), The Register-Guard, The Eugene Weekly, KLCC Public Radio, KUGN Morning News - Storm Kennedy & Al Kline, University of Oregon School of Music & Dance, Sign Pro, KMTR, The Ink Well Printing & Graphic Solutions, WOW Hall, Full-City Coffee, Marche Provisions, Monster Cookie Co, Café Soriah/Casablanca, The Broadway, Consumer Credit Counseling (CCCS) agencies - Apprisen Financial Advocates, Goodwill Industries - Prosperity Center, NEDCO (Neighborhood Economic Development Corporation), Eugene Macintosh Users Group

About FPA and the FPA of Mid-Oregon

The FPA of Mid-Oregon is the local chapter of the The Financial Planning Association® (FPA®) - please go to the following website for more information,
<http://www.fpanet.org/Chapters/MidOregon/>.

The FPA is the leadership and advocacy organization connecting those who need, support and deliver professional financial planning. FPA demonstrates and supports a professional commitment to education and a client-centered financial planning process. Based in Denver, Colo., FPA has 95 chapters throughout the country representing tens of thousands of members involved in all facets of providing financial planning services. Working in alliance with academic leaders, legislative and regulatory bodies, financial services firms and consumer interest organizations, FPA is the community that fosters the value of financial planning and advances the financial planning profession. For more information about FPA, visit www.FPAnet.org or call 800-322-4237.

About CFP Board

The mission of Certified Financial Planner Board of Standards, Inc. is to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for personal financial planning. The Board of Directors, in furthering CFP Board's mission, acts on behalf of the public, CFP® certificants and other stakeholders. CFP Board owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. CFP Board currently authorizes more than 61,000 individuals to use these marks in the United States. For more about CFP Board, visit www.CFP.net or call 800-487-1497.

About Foundation for Financial Planning

The mission of the Foundation for Financial Planning is to help people take control of their financial lives by connecting the financial planning community with people in need. The Foundation funds programs that provide pro bono financial planning, and connect volunteers through the involvement of the financial planning and services community. The Foundation strives to help people who are underserved by the market, in need of financial guidance, or in a financial crisis. The Foundation aims to improve the lives of all Americans through access to pro bono financial planning and financial life skills education to provide those at all socio-economic levels with the knowledge to control their financial lives and opportunities to obtain unbiased financial advice in time of crisis and disaster. For more information about the Foundation for Financial Planning, visit www.foundation-finplan.org.

About The U.S. Conference of Mayors

The U.S. Conference of Mayors is the official nonpartisan organization of cities with

populations of 30,000 or more. There are 1,204 such cities in the country today. Each city is represented in the Conference by its chief elected official, the mayor. More information about the Conference is available at www.usmayors.org.