



OF *SOUTHWESTERN OHIO*

March 2015

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Upcoming Events

Wright State University LIFT Symposium



Wright State University and the FPA of Southwestern Ohio chapter have teamed up to offer advisors, accountants, and attorneys a seminar dedicated to critical financial planning topics. Paid attendees will be given access to our approved Ethics program to complete the FPA CE ethics test.

RAJ SOIN
College of Business

WRIGHT STATE
UNIVERSITY

Where: Wright State University - Student Union

When: March 27, 2015

Cost: \$25 Student, \$100 Advisor Early Registration, increases to \$125 March 15th

Cost Includes: Continental breakfast, CFP Board Approved Ethics Exam Online, Lunch, and after-event networking session.

Questions? Contact Sharon Wik at sharon.wik@wrightstate.edu or 937-775-3141

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Retirement Income Summit

May 4-5, 2015 - Westin Chicato River North

[**Register Here Now!**](#)

Developed by the editors of InvestmentNews, the 2015 Retirement Income Summit aims to illuminate the challenges and opportunities advisors face when generating, sustaining and protecting the clients' retirement income. This focused conference will give the more than 300 professionals in attendance unique and practical tools to navigate the economic, market and policy uncertainties that face their clients in or near retirement.

InvestmentNews has called on leaders from the worlds of investing, government and academia to share with advisors the latest thinking in retirement policy, behavioral finance, portfolio theory, demographics, insurance, Social Security, estate planning and taxation - which advisors can take back to their clients and put to work immediately.

[Click here](#) for detailed agenda, speakers list, and related information about the conference.

Our Mission Statement

The Financial Planning Association of Southwestern Ohio is the leadership advocacy organization that connects those who need, support and deliver professional financial planning in Cincinnati, Dayton, and Northern Kentucky.

We are here to help you grow your practice, share best practices, and foster the financial planning discipline in the region. We offer insightful customized educational opportunities, professional networking events, and organized community service activities to bolster the image of your practice and the industry.

Please reference your FPA Membership in your advertising and encourage it among your peers. Logos can be displayed in marketing materials.

Benefits of Membership

The FPA's Member Discount Program connects members with discounts on practice management products and services that more than cover the cost of the annual membership dues. Were you aware that you could save:

- 15-30% off financial planning software
- Up to 80% off office supplies and 22% off shipping services
- \$200 off valuation services
- 20-25% off tools such as e-signature and secure file sharing
- CFP® education discounts and scholarships
- 30% off hosting and design services for websites



The listing of all the Member Discounts can be found [HERE](#).

June Chapter Meeting - Sue Denny, Social Security Administration

We are bringing back [Sue Denny](#) of the Social Security Administration for our June 9th chapter meeting at Rookwood to give a more advanced session on Social Security and Medicare planning issues. If you have particular questions that you want her to field or particular issues that you have clients dealing with, please send an email to admin@fpacinti.org with the details for Sue to prepare. Sue's goal, through these responses, is to address advanced topics associated with Social Security and Medicare planning.

Certified Financial Planner Exam Discounts

do you have some new associates who will be needing to take the CFP® Certification Examination? make sure they know that FPA members receive a \$200 discount on the CFP® Board enrollment for the exam.

There are special discounts available for the 7 course education process and from a variety of vendors for review classes and materials. The list of the various vendors can be found [HERE](#). Please remember that [Keir Education Resources](#) (a local FPA sponsor) offers a scholarship for each exam. Contact [Keir](#) for details.

Educational Events

The FPA of Southwestern Ohio is dedicated to helping you create a professional network and providing educational events that directly profit your practice. Our goal is to help you make your practice more efficient, compliant, and profitable. All the events listed below are being sponsored directly or advocated by your local FPA Board to help achieve these goals. We hope that you enjoy. Please share this

newsletter with your colleagues.

[March 19th Business Succession Planning Meeting](#)

[March 27th Wright State University LIFT Symposium](#)

[May 4th & 5th Investment News Retirement Income Summit](#) - \$100 discount for members, use the discount code "FPA"

[May 5th](#) Clary Redd 37th Annual KeyBank Estate Planning Seminar - \$200 for FPA members

May 6th - FPA of Southwestern Ohio Chapter Meeting - Wright State University - Mark Reckman - "Aging Clients and Memory Loss"

June 3rd - FPA of Southwestern Ohio Chapter Meeting in Cincinnati - Speaker, Sue Denny with the Social Security Administration - send your topic ideas to admin@fpacinti.org



Pro Bono

The FPA offers many volunteer opportunities. Community volunteerism can be a marketing asset to your firm. Advertise to your clients that you do care about the community. Offer some time for your colleagues to do activities during the work week.

Remember: When you care about what your clients and employees care about, clients and employees care more about the firm.

You can learn more about local programs available by contacting [Chris Davis directly](#) or email admin@fpacinti.org

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"Support Those - Who Support Us - Supporting You"



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