

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Program

Chair Mike Curley (acting)

Date August 7, 2008

Committee Members:

Doug Jones; Pam Gilmour; Jeff Merwin; Pete Dixon

New Members as of last committee report:

None

Members that have left since last committee report:

None

Updates:

- June CE seminar recap

Total reservations	28
No-shows	6
Walk-ups	1
Total attendees	23
No-charge/prospective member guests *	0
No-charge/other guests *	0
Interpreter no-charge guests*	0
Speaker no-charge guests *	2
Partner no-charge guests *	2

** included in total attendees*

- June CE seminar survey results can be seen at http://www.surveymonkey.com/sr.aspx?sm=N_2fF50XPXEUoGkkwIIZkARDgii7ELY1_2b_2fWWEarlv91ws_3d.
- All topics/presenters for the September, October, November, and December CE seminars were resolved by the committee.
- The July 10 networking social at Eggspectation in Ellicott City was attended by 30 members, guests, and non-members.
- Final details of the August 14 networking social at Mitchell's Golf Complex in Reisterstown are complete.

Upcoming Events:

August 14 networking social (Golf 'N' Gab) at 4 PM in Reisterstown

September 11 CE seminar at 11:30 AM in Columbia

October 16 CE seminar at 11:30 AM in Cockeysville

November 13 CE seminar at 7:30 AM in Columbia

December 11 CE seminar at 7:30 AM in Cockeysville

Concerns/Issues:

Finding a permanent chair prior to the September SPM.

Upcoming Committee Meetings (time, date, venue):

August 20, 2008 at 3:30 via teleconference

September 17, 2008 at 3:30 via teleconference

October 22, 2008 at 3:30 via teleconference

November 19, 2008 at 3:30 via teleconference

December 17, 2008 at 3:30 via teleconference

Toll free # is 877-643-6951/participant passcode is 49361102#

Succession strategy:

Find a permanent committee chair.

**Financial Planning Association of Maryland
COMMITTEE REPORT**

Committee Name: Membership

Chair:

Retention - Mary Dunlap

Recruitment - None

Date: August 7, 2008

Retention Committee Members

<i>Name</i>	<i>Relationship Ambassador for Month's Members</i>
Sharon Seal	September
Glen Ankenbrand	Eastern Shore Members
Mary Dunlap	March

Retention Committee Members Joining: None

Retention Committee Members Leaving: None

Member Services:

Education Outreach: George Jankiewicz/FPA of MD - Chair

Ronn Nuger/UMBC and AACC

Tyler Claggett/Salisbury U (Tyler will be on sabbatical from the university during the 2008-2009 school year and will not be available for the committee's work during that time. **Cindy Malament, JD**, adjunct professor at Salisbury U, will take Tyler's place.)

Dwight Mikulis/FPA of MD

Kim Magaha/FPA of MD

Patricia M Rudolph , PhD, CFP® (new member)

New Member Breakfast:

Wednesday June 25 at Annapolis MD -- 2 new members scheduled to attend and one was a "no show".

Concerns/Issues

1. Low Manpower
2. **There were 2 positive, idea-generating phone conferences attended by Mary Dunlap**

- a. June 26 – FPA membership committee chairs call-in for discussion on ideas to recruit and retain members
 - b. July 29, 2008 - Chapter Leader Best Practices: Membership
 - i. Jaleen Edwards, FPA, Tricia Rieple, FPA and Jacqui Friedrich, FPA of W. North Carolina, Rick Mayo, FPA of Hampton Roads
- 3. Some worthwhile issues that the committees and board should discuss to recruit and retain members (as well as volunteers). (Note – we may already be doing some of this). This is based on the 2 calls mentioned above.**
- a. Recruit:
 - i. Member Get a Member
 - 1. Make it an internal contest for the local chapter
 - 2. Begin the announcements about the contest early
 - 3. Suggest to members ideas about who they can contact to get to be a member
 - 4. Award prizes to chapter members for recruitment contest objectives --- as example --- the most referrals, the most unusually obtained, etc.
 - ii. Use our Toolkits
 - 1. Order the FPA national membership marketing supplies ----- for example 108 Benefits of Membership, etc. – have someone responsible for ordering supplies and bringing to all meetings and events
 - iii. Capture the CFP certificants
 - 1. Find out where the CPF exams are held and wait for the exam to end – hand out materials (FPA membership packets) & take CFP certificants to eat, drink after the exam to talk about the exam, their career and how the FPA can help.
 - iv. Colleges who offer financial planning courses
 - 1. Go to colleges and talk to professors and department heads that run the programs – conduct some classes as part of the curriculum.
 - 2. Go to career center and meet career counselor - talk about how the FPA can help college graduates make their financial planning careers a success.
 - v. Contact Allied Professionals

1. Identify allied professionals – such as mortgage industry, attorneys, accountants, banks – the FPA member contacts the allied professional and meets them for FPA meetings and also introduces the current membership campaign for allied professionals.
 2. Send invites and follow-up with call or meeting
 3. Utilize the allied professionals as speakers for FPA meetings on topics that are important to the FPA memberships.
 4. Also use the chapter partners who sponsor FPA – have them as speakers or allow them to bring speakers, etc.
- vi. Gen X Practice Development
1. Topics relevant to Gen X people
 2. Have a theme for meetings or special study sessions
- vii. Offer Free Ethics Course to New Members
1. Membership Orientation Event
- b. Membership Retention – Appreciation
- i. Survey membership – take 3 to 5 minutes and have attendees physically complete the survey and collect them right away.
 1. Offer prize drawing for completed surveys
 - ii. Rotate locations and timing of meetings
 - iii. Having Afternoon sessions and then FPA happy hours afterwards
 - iv. “FPA after 5” – Happy hours every other month. Invite new members and introduce them to people.
 - v. Renewing members appreciation events
 - vi. Web casting of meeting and events so that members who could not attend could listen in
 - vii. Buddy System – for meetings, happy hours
 1. Identify new members and visitors to events – introduce them and be with them during events
 - viii. FPA national chapter has sample surveys,

- c. Components of a successful membership committee
 - i. Welcome Wagon
 - 1. See how the rotary organization does this
 - ii. Call people who leave - "The Grim Reaper"
 - iii. Create Pro Bono Groups, Study Groups - Special Interest Groups
 - 1. Have events to create a special interest group - so that people get connected and involved

Upcoming Committee Meetings (date, time and venue): New time based on contacting existing membership committee members - third Monday of each month at 4pm. Reminders have and will continue to go out.

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Partners

Chair Lori Silverthorne

Date August 5, 2008

Committee Member names:

Lori Silverthorne (chair)

Rosemarie Cohen

John Danz

Tres Hughes

New members (names) since last committee report:

none

Members that have left (names) since last committee report:

none

Updates:

-As stated last report...**The committee is focused on developing the 2009 partner benefits. We need the help of the program committee to understand how they think partners will fit in with the overall programming.**

-Need feedback from board for ideas to shape 2009 benefits

Upcoming Events:

The committee plans to discuss the possibility of a partner's breakfast to be held in early October prior to the sending of the partner's renewal letters.

Concerns/Issues:

-Having difficulty getting committee members to participate on monthly calls.

Considering a face-to-face meeting to discuss 2009 benefits.

-having difficulty getting response from Program committee on layout of next year's meetings

-there has been no headway made by the committee on talking to non-traditional partners (*e.g.*, P&C insurance brokers, and software publishers) for 2009.

Upcoming Committee Meetings (time, date, venue):

September 17th via conference call.

Succession strategy:

I plan to continue as committee chair through 2009.

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Government Relations

Chair William Bissett

Date July 31, 2008

Committee Members:

Craig Berman, Crystal Alford-Cooper, Jim Ludwick, Joe Dankowski, Adam Freeland

New Members as of last committee report:

None

Members that have left since last committee report:

None

Updates:

- 1) We have six speakers ready for the October CE meeting.
- 2) Continue working with Program Committee to put together the October CE meeting.

Upcoming Events:

Government Relations is responsible for the October 2008 CE session hosting Melanie Lubin (MD Securities Commissioner), Del Jeff Waldstreicher (Montgomery Co), Sen Jim Robey (Howard Co), Duane Thompson (FPA GR), Del Jon Cardin (Baltimore Co), Del Dana Stein (Baltimore Co).

Concerns/Issues:

We need to continue staying in touch with the legislators who came to Annapolis. The committee will discuss the means of accomplishing this goal at its August meeting.

Upcoming Committee Meetings (time, date, venue):

August meeting date TBD.

Succession strategy:

Craig Berman has agreed to succeed me as committee chair.