

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Partners

Chair Joe Garrison

Date 11/29/07

Committee Member names:

Joe Garrison (Chair)
Lori Silverthorne
Rosemarie Cohen
Tres Hughes

New members (names) since last committee report:

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

Updates:

Renewal are going better than anticipated. To date we have 7 commitments at Platinum (\$3500 per), one commitment at Gold (\$2k) and two commitments at Silver (\$1k). We are still waiting to hear from some of 2007 Platinum partners about renewal and from two prospects.

Mike C. and I discussed changing the print directory and offering the partners ad space in our e-blasts instead. He and I think this is actually better than the directory ads. I need to communicate this to partners and solicit feedback.

Upcoming Events:

Concerns/Issues:

Renewals.

Upcoming Committee Meetings (time, date, venue):

Our next cc is scheduled for December 3.

Succession strategy:

Lori Silverthorne has accepted the job of successor committee chair, starting January 1, 2007.

Partner	Renew In 2008	Renewal Level	Estimated Revenue	Confirmed?	2007 Level	Contact Name	Phone	Cell Phone	email
AIM Funds	NO	-	-	survey	Platinum	Anne Marie Laboe	301-639-8375		Annemarie.laboe@aiminvestments.com
Allymac Mortgage Services	YES	Platinum	\$3,500	email 11/20	Platinum	Neil Sweren	410-902-4660		neil@allymac.com
American Funds	YES	Platinum	\$3,500	emial 10/31	Platinum	Brian Casey	800-421-2306		Brian_Casey@cangroup.com
Fidelity Investments	YES	Platinum	\$3,500	phone conv 11/12	Platinum	Michael Doherty	410-804-0368		michael.lis.doherty@fmr.com
Pacific Life Insurance Company		Platinum	\$3,500	email 11/11	Platinum	Robert D. Snell, ChFC, MSFS	800-722-2333, Ext. 2336		RSNELL@PacificLife.com
Primus Mortgage Advisors	YES	Likely Platinum	\$3,500	Holding as of 11/7	Platinum	George Collis, CFP®	410-974-1316		gcollis@cmfloans.com
Thornburg Investment Management	YES	Platinum	\$3,500	email 11/16; application 11/9	Platinum	Dan Reilly	877-215-1330, Ext. 5299		dreilly@thornburg.com
Oppenheimer Funds	NO	-	-		Platinum	Rick Rath	703-299-0406		rath@oppenheimerfunds.com
Jackson National Life Insurance Co.	YES	Platinum	\$3,500	email 11/19	Platinum	Brad Crawford	410-353-4021		bradley.crawford@jnli.com
Allianz Global Investors/Pimco Funds	YES	Likely Platinum	\$3,500		Platinum	Andy Laing	410-991-1321		andrew.laing@allianzinvestors.com
Success Business Services	YES	Platinum/pro-rated 2007	\$2,333	email 11/9	Platinum	Mike Wallace	443-512-8991		mike@successbusinessservices.com
Chesapeake Financial Settlements	YES	Gold	\$2,000	email 11/12	Gold	Joe Young	240-403-1509		jyoung@chesapeakefs.com
UMBC Training Centers	????	-	-		Gold	Kent Malwitz	443-543-5418		ksaltz@umbctrainingcenters.com
John Hancock Wood Logan, Inc.	NO	-	-	phone conv 11/1	Gold	Chip Saltz	443-418-6084		csaltz@manulifeusa.com
John Hancock Funds, LLC	NO	-	-	phone conv 11/1	Gold	Danny Cohen	240-643-4571		dcohen@jhancock.com
Charles Schwab Institutional (see below too)	YES	Silver	\$1,000		Silver	Lori Silverthorne	301-657-5661	410-440-8648	lori.silverthorne@schwab.com
Nueberger Berman Management, Inc.	YES	Silver	\$1,000	email 11/2	Silver	Ross David	215-399-1106		rdavid@nb.com
Sun Life Financial	Maybe	Likely Silver			Silver	Scott McIntyre	443-243-8800		SMcIntyre@SLFD.com
Suntrust Bank		Silver	\$1,000						
Ivy Funds	YES/NEW	???	\$1,000						
AXA Dist.	????								
Julius Baer	????								
Bank of America	????								
		TOTAL EST. REVENUE	\$36,333						

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Government Relations

Chair William Bissett

Date November 28, 2007

Committee Members:

None

New Members as of last committee report:

None

Members that have left since last committee report:

Updates:

- 1) Worked with Chamber of Commerce and FPA National to monitor and report the Maryland Special session.
- 2) Have spoken with Karen Syrylo about speaking at our February FPA meeting (in Columbia?).
- 3) Need to email FPA National to request information for our November PAC contributors and our PAC contributors for the year.
- 4) Have spoken with other local GR Committees about their efforts. Will try to continue the conversation in 2008.

Upcoming Events:

Need to address FPA Day in Annapolis

Concerns/Issues:

As always, obtaining committee members is the top concern.

Upcoming Committee Meetings (time, date, venue):

Succession strategy:

None at this time.

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Public Relations

Chair Patrick Monaghan

Date November 29, 2007

Committee Members:

Linda Tice (NAWBO) ; Dena Frankel (MCFL)

New Members as of last committee report:

0

Members that have left since last committee report:

0

Updates:

Identified possible new member. Attempting to schedule a meeting with him next week (December 3-8). Also began working with my wife, Mikey (a PR and media person), on understanding what needs to be done to successfully develop a working relationship with media types. She is providing me with a list of media contacts that have been responsive to her in the past, with a focus on those that are interested in financial topics. Plan is to share this with the committee after I have developed one.

Upcoming Events:

N/A

Concerns/Issues:

N/A

Upcoming Committee Meetings (time, date, venue):

N/A

Succession strategy:

Not yet identified. I am committed through 2008.

Financial Planning Association of Maryland
COMMITTEE REPORT

Committee Name Membership

Chair George Jankiewicz (Acting)

Date December 2, 2007

Committee Members:

Membership Retention/Mary Dunlap, Chair

- January Relationship Manager/John Moore
- February RM/Kim Anderson
- March RM/ _____
- April RM/ _____
- May RM/ _____
- June RM/ _____
- July RM/ _____
- August RM/ _____
- September RM/ Sharon Seal
- October RM/ _____
- November RM/ _____
- December RM/ Kalen Baxter _____
- Eastern Shore RM/ Glenn Ankenbrand

Membership Recruitment/No Current Chair

Membership Services

Education Outreach/Dwight Mikulis, Chair

- Joe Garrison
- Ronn Nuger
- Tyler Clagget
- Doc Steedle
- Bob Schmidt
- George Jankiewicz (2008 Chair)

Member Update

The Education Outreach Committee awarded the second 2007 FPA of MD \$1,000 scholarship award to Allan Thompson, who was presented with the award at the November 8, 2007 CE Seminar. Five candidates were considered – all of whom had strong credentials.

As of the date of this report total membership is at 420; 7 new members attended the October breakfast meeting, and no new members attended the November breakfast meeting.

Concerns/Issues

- Continued low manpower in the retention and recruitment sub-committees.
- Inability to find a successor committee chair
- Discussion of coordination of Listening Project with Membership Committee relationship manager process needs to take place after the Listening Project initial results are accumulated. Will future volunteers be de facto Membership Committee volunteers? For now, the retention volunteer activity continues to be a separate function from the Listening Project. The retention committee is focusing on maintaining ongoing relationships with assigned members, calling periodically to see how they are doing and if there are any concerns or questions regarding FPA. The LP is delving into the personal and business aspects of assigned members – interviews are not direct bringing up FPA issues.

Upcoming Committee Meetings (time, date, venue):

The retention sub-committee continues to meet by phone at 9 AM on the third Thursday of each month. Mary Dunlap is to follow-up with volunteers who were not on the November call to get an update of their activity and participation level.

**Financial Planning Association of Maryland
COMMITTEE REPORT**

Committee Name Programs

Chair Jason Abosch

Date December 3, 2007

Committee Members:

Doug Jones; Pam Gilmour; Shirley Bors; Jen Goldman; Jeff Merwin

New Members as of last committee report:

0

Members that have left since last committee report:

0

Updates:

January CE - Anirban Basu at Loyal College in Timonium

February CE - Tenative - Chamber of Commerce Reprsenative and Comptroller to discuss state taxes and fiscal policy

Broader issues - only email will be used for marketing of CE classes

Program Committee conference calls to take place at 3:30 the Wednesday following a CE or social program.

Upcoming Events:

December social and January CE

Concerns/Issues:

N/A

Upcoming Committee Meetings (time, date, venue):

December 19 at 3:30 via phone

Succession strategy:

Not yet identified