

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Program

Chair Charlie Wolpoff (Acting)

Date 6/11/2007

Committee Member names:

Pam Gilmour, Chair/ Social Meetings Sub Committee

Doug Jones, Jeff Merwin, Shirley Bors, Jo Ann Huston, Raymond Heidel/CE Seminar Sub Committee

New members (names) since last committee report:

Jo Ann Huston, Raymond Heidel

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

NONE

Updates:

- May CE Seminar stats:

Total reservations	92
No-shows	0
Walk-ups	2
Total attendees	94
Speaker no-charge guests	6
Partner no-charge guests	15

** included in total attendees*

Survey Monkey post-meeting survey response was 43 of 86 mailed. Detailed results are available at

http://www.surveymonkey.com/sr.aspx?sm=9BOgwayUqytqADRxThUtKOyxcpB4EU20Jb21CP6Mu6k_3d

- The July CE Seminar has been scheduled. The hard copy meeting notice will be mailed to members and non-member CFPs the week of June 11. The agenda for the meeting has been posted on the website (<http://www.fpamd.org/events.php?EID=74>).
- The committee has met via conference calls to discuss topics/speakers for forthcoming meetings. It was agreed that by July 18, the committee will have contacted selected speakers for Sept. and Nov. meetings, and have compiled a list of topics/speakers that will be used to make a decision regarding programs for 2008. The committee welcomes suggestions from any source regarding topics/speakers.
- Lena's survey developed "leads" for five potential committee members. These five responded to the following question: Would you be interested in helping us brainstorm prospective programs and content for our chapter meetings, and be willing to contact potential speakers? Those who responded are:

Raymond Heidel	410-287-2155	planner@pobox.com
Marianne Leedy	410-435-9177	mvleedy@yahoo.com
David C. Lehmann CPA/PFS, CFP	410-583-5540	dcl@hbccpa.com
Elaine Shanley	410-494-7766, ext. 16	elaine.shanley@yco.com

JoAnn Huston

410-829-7458

jphcpa@aol.com

All members have been contacted. JoAnn and Raymond have joined the committee.

Upcoming Events:

Thursday, June 14th @ Bluestone Grill in Timonium – Networking Social

Thursday, July 12th @ Pikesville Hilton – CE seminar

Thursday, August 9th, location to be decided – Networking Social

Concerns/Issues:

Although May's Super CE program predictably attracted more attendees than the usual meetings, after subtracting non-paying guests, the attendance was about 73. That is a decrease from previous years' Super CEs. It continues to be clear that we must reach out to the entire membership to see what it is that they want. As suggested previously in this report, the "reach-out" should include direct telephone and face to face contact (one-on-one, and focus groups).

Upcoming Committee Meetings (time, date, venue):

9:00 AM/July 18, 2007/teleconference

Succession strategy:

We need to find a permanent chairman for the committee. Thus far, committee members who have been approached have declined. Doug Jones has been contacted, face-to-face, regarding the committee chair position for 2007, but he has declined the position citing other prior personal/business commitments as the reason. The topic has been broached with new committee member, Jeff Merwin, as well. Jeff feels he is not ready to chair the committee. In addition, Shirley Bors has been asked and declined for the present.

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Government Relations

Chair William Bissett

Date June 5, 2007

Committee Members:

Josh Itzoe

New Members as of last committee report:

None

Members that have left since last committee report:

None

Updates:

Have contacted the following people about joining the Government Relations Committee or helping out with a specific project:

- 1) Greg Lowe - contacted prior to vacation about increasing the awareness of the 'tax on services bill' that will likely be part of a special Maryland Legislative Session this fall.
- 2) Christine Schmitz - helping out with the insurance update part of our newsletter
- 3) Charley Kenney - help out with the accounting/tax aspect of our update.

So far the people that I have contacted have been receptive to helping out in a limited capacity. In other words, clearly defining what they need to do has been helpful in getting these volunteers to agree to some level of contribution. The problem is that I have not had a chance to define what/how we need them to fill in. The last month or so of planning for the wedding took away a lot more of my time than I thought it would and I never got a chance to sit down and begin thinking through clearly defined roles.

I have followed up with a letter to each of the General Assembly members who attended our March Annapolis event. It was a simple handwritten thank you. However, I have not done anything since that letter went out to each of them. I realize that we need to continue to stay in front of each of them, but I have not been able to determine a good follow up yet.

Upcoming Events:

None

Concerns/Issues:

As always, obtaining committee members is the top concern.

Upcoming Committee Meetings (time, date, venue):

July 10 at 4pm.

Succession strategy:

None at this time.

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Partners

Chair Joe Garrison

Date 5/31/07

Committee Member names:

Dan Reilly
Joe Bouffard
Joe Garrison (Chair)
Lori Silverthorne
Rosemarie Cohen
Tres Hughes

New members (names) since last committee report:

Joe Bouffard
Lori Silverthorne
Rosemarie Cohen

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

NONE

Updates:

We have our next committee meeting on 6/4. It will be a breakfast meeting so that all of the new faces can introduce themselves.

A VERY ROUGH draft of a partner agreement has been created. I've attached a copy and I can not stress enough that this is a ROUGH DRAFT. This will be one of the main topics at our upcoming committee meeting.

Upcoming Events:

Committee meeting 6/4

Concerns/Issues:

- We got some negative feedback after the Super CE meeting that there was not enough networking time at that meeting for the partners.
- I am happy that I have been able to grow the committee to 6 members and hope that among our new members, someone will emerge as a successor Chairperson. Presently there is no succession plan in place.
- Meeting attendance is of much concern to me because I fear that our Platinum partners will no longer value their speaking time if attendance continues to fall. In addition, I'm extremely concerned about our July meeting attendance with it being the summer. We have gone to great lengths to put together a nice line up of partners presenting some extremely interesting round table topics and I am concerned that we will not be able to deliver a good audience to them in July. I'm keeping my fingers crossed that this is not the case and I do will have to defend our chapter to our partners who have committed their time and money to us that day.

Upcoming Committee Meetings (time, date, venue):

Per our plan of work, we meet on the first Monday of the even months of the year. Typically this is done via conference call. Our next meeting on 6/4 will be a breakfast.

Succession strategy:

There is not one currently in place. I'm hoping that with my expanded committee, one of the new members will emerge as a successor.

Letter of Agreement for Year 2008

The undersigned party (herein after “Partner) hereby applies to become a Partner of the Financial Planning Association of Maryland chapter (hereinafter the FPA of MD) under the terms of the “Partnership Program” (hereinafter “Program”) for the 2008 sponsorship year. If Partner is accepted to the Program, Partner further agrees to a partnership contract term of January 1st through December 31st (or from date of acceptance into the Program through December 31st if joining mid year), payable in advance.

The FPA of MD strives to develop quality partnership relationships with sponsors who have a long-term interest in supporting the financial planning industry. Partner understands that Program has the ultimate right to refuse acceptance to any party without recourse in its pursuit of that goal. All benefits are offered with the understanding that the Partner assumes the responsibility to make payment in time to allow benefits to be used within calendar year.

Platinum Partnership Benefits: (limited to 13)\$3,500

- Recognition at all FPA of MD meetings and events
- Online presence and links on FPA of MD website (www.fpamd.org)
- Copy of FPA of MD directory – hardcopy and electronic versions
- Listing for each partner in the FPA of MD directory
- Invitation to annual “partners only” breakfast (tentative date _____)
- Updates to the FPA of MD electronic membership directory upon request
- Access to a direct liaison of the FPA of MD Partners Committee
- Membership on Partners Committee and invitation to all committee meetings
- Access to custom demographic membership data
- 10% Early Bird Discount if partner’s fee is paid in full by January 15, 2008
- First right of refusal to renew platinum-level partnership for 2009 (must notify the FPA of MD of your intentions by 12/1/08 to guarantee your 2009 platinum partnership)
- One 20-minute Non-CE speaking slot or one 25-minute Half-hour CE speaking slot at one of the CE meetings
- First right of refusal for event sponsorship opportunities
- Free attendance to all FPA meetings and events
- Display table at all CE meetings (including Super CE)
- Full page advertisement in the FPA of MD Directory
- Up to 12 articles per year posted and promoted on the FPA of MD website

Gold Partnership Benefits:\$2,000

- Recognition at all FPA of MD meetings and events
- Online presence and links on FPA of MD website (www.fpamd.org)
- Copy of FPA of MD directory – hardcopy and electronic versions
- Listing for each partner in the FPA of MD directory
- Invitation to annual “partners only” breakfast (tentative date _____)
- Updates to the FPA of MD electronic membership directory upon request
- Access to a direct liaison of the FPA of MD Partners Committee
- Membership on Partners Committee and invitation to all committee meetings
- Access to custom demographic membership data
- 10% Early Bird Discount if partner’s fee is paid in full by January 15, 2008
- First right of refusal to upgrade platinum-level partnership for 2009
- Free attendance to all FPA meetings and events
- Display table at Super CE Meeting only
- Half page advertisement in the FPA of MD Directory
- Up to 4 articles per year posted and promoted on the FPA of MD website

Silver Partnership Benefits:\$1,000

- Recognition at all FPA of MD meetings and events
- Online presence and links on FPA of MD website (www.fpamd.org)
- Copy of FPA of MD directory – hardcopy and electronic versions
- Listing for each partner in the FPA of MD directory
- Invitation to annual “partners only” breakfast (tentative date _____)
- Updates to the FPA of MD electronic membership directory upon request
- Access to a direct liaison of the FPA of MD Partners Committee
- Membership on Partners Committee and invitation to all committee meetings
- First right of refusal to upgrade platinum-level partnership for 2009
- Free attendance to three FPA meetings and events

Platinum Partner Speaking Preference

If applying for Platinum Partnership, please select your first and second choice for your speaking date by placing a 1 and a 2 next to the dates below:

- ___ January 10
- ___ March 13
- ___ May 8
- ___ July 10
- ___ September 11
- ___ November 13

Speaker Recommendations

The FPA of MD would like to offer you the opportunity to recommend a topic and speaker for one of our CE meetings this year. Kindly list any speaker that your/or your organization could provide us with by writing his/her name in the blank next to the corresponding date they would be available.

- January 10 _____
- March 13 _____
- May 8 _____
- July 10 _____
- September 11 _____
- November 13 _____

Responsibilities of Partners

Responsibilities of Partners will include:

- Prompt payment of annual partnership fee. Refer to the benefits above for Early Bird Discount details.
- Active participation in the education of our membership on your company’s products and services.
- Assume the responsibility to take advantage of benefits to be used within calendar year.

FPA of Maryland may:

- At its sole discretion, accept deny, non-renew, and/or terminate Partner.
- Schedule, reschedule, or cancel, at its discretion, meeting dates or presentations and will not be responsible for any Partner liabilities, financial or otherwise, arising from such actions.

- Change the Partnership fees and/or benefits and/or prompt payment discounts at renewal within 30 day notice.

Partners agrees to the above terms, and hereby applies for a sponsorship with the FPA of MD in the Program as a:

- Platinum Partners
- Gold Partner
- Silver Partner

Entered into this _____ day of _____, 20____.

Signed by:

Signature

Printed Name

Company Name

Email Address

Address City State Zip

Toll Free Number

Phone

Fax

**Financial Planning Association of Maryland
COMMITTEE REPORT**

Committee Name Public Relations

Chair Jason Abosch

Date June 4, 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:

3rd Media Training Conducted 6/5/07; \$2,500 of contingency funding raised for FP Week event; grant submitted to Foundation for Financial Planning to cover the cost of Financial Planning Week event; Individuals interested in volunteering during FP Week (subject to time and date) include: Elaine Shanley, Scot Stark, Rosemarie Cohen, Mary Martin, Patti Farrell, Tiffany Lymon, Pat Rudolph, and Anneliese D'Souza. Other potential volunteers, although less likely to participate include, Robert Wasilweski and JoAnn Huston.

Upcoming Events:

Developing and distributing press releases once FP Week details are finalized

Concerns/Issues:

N/A

Upcoming Committee Meetings (time, date, venue):

N/A

Succession strategy:

Not yet identified