

Financial Planning Association of Maryland
Membership Committee
May 31, 2005

Membership Committee Members: George Jankiewicz, Jason Herzberger, Jennine LaCroix, Scott Eisgrau, Mary Dunlap, Eric Meushaw, Sharon Pickeral, Rachel Schaeffer

Vision – To facilitate the growth of the Maryland FPA through effective recruitment and retention programs. Growth will be measured by the number of new members attracted, the total number of members maintained, and the participation of members in the Maryland Chapter Programs.

Mission – To recruit and retain FPA members through ongoing communication of member benefits, ongoing research of member needs and wants, and continuous outreach to the financial planning community.

Statistics – As of April 30, 2005 chapter membership was at 366 members, a decrease of 8 members since August 31, 2004.

Activities

- New member breakfasts are now being conducted on a regular basis, on the 2nd Wednesday of each month. We have had excellent attendance for the past 2 breakfast meetings and consider this a great opportunity to encourage new members to become active.
- Non-member CFP call night – we have contacted all non-member CFPs in the central Maryland region (Carroll, Harford, Baltimore Co, Anne Arundel, and Howard Counties and Baltimore City) and followed calls with emails encouraging recipients to join the chapter, and have provided a link to the chapter website. Further follow-up through email and calls will continue.
- A program to orient new member at meetings has begun – committee members and other long-time members sit with new members to explain FPA activities, introduce them to other members, and in general make them feel welcome.
- Calls to each terminating member
- Anniversary calls reminding members to renew
- A survey of member satisfaction will be conducted during the summer.
- A push to contact members who have terminated will be made once again this summer to boost membership.

Discussions with members indicate positive feedback for the 2005 format so far. We continue to lose members from outlying areas, and non-CFPs.

Succession Plan – Jason Herzberger has agreed to chair the committee beginning in January 2006. I will continue to serve on the Board and will be a resource to Jason. Committee size continues to increase, but we still need several more members.