

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Membership

Chair Mary Dunlap

Date 2.3.2010

Committee Member names:

Sharon Keys Seal P.C.C.; Edric McSween; Glenn Ankenbrand; George S. Jankiewicz CFP®, CPA;
Robert (Bob) W. Cassel , CFP®, EA; David Forman, CFP®; Brett Lambert, Paul Terry and Nick Critzos

New members (names) since last committee report:

John McMahon

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

none

Updates:

Current Figures – 12/31/2009 active members 327; 11/2009 active members 332; as of 2/3/2010 324 members

Initiatives

12 2009 – Agenda and updates for December 21 meeting

Retention for Current Members – What goal should we have for retention? Mike Curley and Scot Stark said our Board has set a goal of 75% or better retention

Contacting Members who are under 5 years of continuous renewal, not board or committee members

List of people to call

- See the spreadsheet of people
- People who will call the list – Thank you!
 - Brett Lambert, Edric McSween, David Forman, John McMahon (new member – welcome!), Mary Dunlap, Paul Terry, Sharon Seal, Bob Cassel

Agenda

- Program Committee has the following agenda for meetings in 2010:
 - January is Practice Management Session; February is meeting in Annapolis; March is Insurance CE meeting; April – Social event; May is Super CE Symposium
- Mary Dunlap will call in on Program Committee - 3rd Wed of Month
- Mary needs to contact new Program Directors - Pete Dixon and Celie Neville to get more information on other upcoming meetings – February, March, April and May

- Calling First Year Members about 6 months (more or less) to check in with members
 - See the “y” on the call spreadsheet
 - “y but” means that members have joined previous to last year but there was a lapse. So they are not new members – but it is worth calling to check in.,

We agreed to call members on our list to encourage and motivate them to come to the January 14 meeting. Mary Dunlap will send the list of people to call, information and script.

Members reaching Longevity 5,10, 15, 20, 25, 30, 35 years in 2010

- Bob Cassel has volunteered to call those members reaching longevity in 2010 who will be attending FPA meetings.
 - He will let them know that we wanted to recognize them at the meeting and ask them to share a 2-minute introduction about who they are, how they joined FPA and what they like about FPA of MD chapter.
- **Need to get permission of Program Committee to do this – Mary Dunlap will talk with Pete and Celie**
- Mary Dunlap’s assistant will send out a card and gift to each member reaching longevity
- Want to have someone in the Public Relations Committee volunteer to be at the meeting to take a picture and publish the accomplishment in our newsletter and elsewhere

Who will call Joy Slabaugh (head of Public Relations Committee) to get them involved?

Members offering Practice Management Best Practices at Meetings

- Want to introduce a program where at each meeting (except for February and social events) we email members attending events to come prepared with a practice management topic.
- **Who will manage this process?**
- We can ask Mike Curley to include a note in his email blasts
- **When registering at the meeting – could someone be there to remind people coming in to have a best practice tip?**

- Coordinate with Public Relations Committee to have pictures taken and interview held on the 2 to 3 members who volunteer and offer their ideas at the meeting.
- Send gift to members who volunteered their best practice idea - use Send Out Cards – notify Mary Dunlap so she can have her assistant send it out.

Calling Other Members

- For the other members who have renewed 5 years or more; are board members and/or are committee members
- Who can we ask (who would benefit) to call these members?
- For example – could we ask our Chapter Partners to volunteer?

- **Who would run this process to talk with the Partner Committee and the Partners?**

FPA Ambassador Program

- Bob Cassel runs this program

- Every meeting Bob coordinates a FPA Member Ambassador to meet a new member at the Chapter meeting
- Bob will ask the Ambassador for any feedback from the new member so that we can pass to appropriate person, committee or board member.
- **Thank you Bob!**

Send Out Cards for Existing Members

Mary Dunlap's assistant and Mary Dunlap will send out monthly Thank you's for renewing members and a 6-month "how are we doing?" card for our first year members

New Members - What goal should we have for New Members?

Welcome New Members

Welcome Call

Sharon Seal calls new members to welcome them and invite them to breakfast

Mike Curley sends out an email.

New Member Breakfast

Mike Curley organizes monthly breakfasts --- to introduce new members and ask them to join committees

Committee and Board members attend --- Sharon Seal attends for the membership at Annapolis and Columbia breakfast locations. Mary Dunlap attends for the Towson breakfast locations

FPA Ambassador - welcome

Bob Cassel runs this

Someone to greet 1st year members at registration table?

Program to get members who let their membership lapse

Meet with CFP certificants after they complete their comprehensive exam for food and drink on us and talk about our chapter?

Find the testing location - call CFP Board

Get budget approval

Select place within walking distance or directions to place nearby for food and drink

Coordinate volunteers to be at this testing location - before and after the second day of exam - Saturday.

Follow-up with people who came to place for food and drink or others who signed the form (but could not attend)

Another FPA Career Day

April or May 2010

Work on logistics

Find employers who are looking for interns or permanent employment

Concerns/Issues:

Determining how to follow-up with non-renewing members

Need to complete our plan of work – we are progressing

Have contacted Scot Stark by email to talk about Membership budget so that we may proceed with initiatives.

Having enough volunteers – but we should have some FPA members who are not part of the membership committee now but can help us on some initiatives.

Making sure that are initiatives are not overwhelming so that goals are achieved and we have results.

Upcoming Committee Meetings (time, date, venue):

Phone meetings held 3rd Monday of each month at 4 pm.

Succession strategy:

Not yet

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Government Relations

Chair Craig Berman

Date 1-27-10

Committee Member names:

William Bissett (Board Member)

Crystal Cooper

Adam Freeland

Steve Berger

Susan Mitcheltree

New members (names) since last committee report:

Susan Mitcheltree

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

Updates:

Several conference calls for committee regarding Annapolis event. The event will be in the Senate Office building on Tuesday February 23, 2010 from 7:00 to 11:00 AM. We have been actively advertising the event. The DC Chapter has been invited to participate and Phillips Hinch of the national event will attend.

Concerns/Issues:

Details for Annapolis meeting

Upcoming Committee Meetings (time, date, venue):

A conference call is scheduled for Friday Feb. 5, 2010 at 10:00.

Succession strategy:

If asked to be appointed to the Board, Crystal Cooper or Adam Freeland would probably be excited to take over.

**Financial Planning Association of Maryland
COMMITTEE REPORT**

Committee Name Partners Committee

Chair Chad Foster

Date 2/2/2010

Committee Member names:

Chad Foster, John Donohue

New members (names) since last committee report:

John Donohue

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

None

Updates:

Mike Curley was able to recruit a new member to the partners committee at the new member's breakfast last month.

Charlie Wolpoff got interest from a LTC carrier rep for \$250 sponsorship for the March 2010 CE.

Concerns/Issues:

None

Upcoming Committee Meetings (time, date, venue):

None

Succession strategy:

None

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Public Relations

Chair Joy Slabaugh

Date 1/29/2010

Committee Member names:

Scott Millen
Neil Sweren
William Bissett
Anneliese D'Souza
Patrick Lee
Karen Brelsford
Adrienne Newberg
Brent Weiss
Keyonta Brown
Lyn Dippel

New members (names) since last committee report:

Lyn Dippel

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

Updates:

Update of press releases and other communications:

- Submitted Board press release to Baltimore Sun, Baltimore Chronicle & Sentinel, North County News, Baltimore Messenger, Baltimore Business Journal, 50 Plus Senior News, The Aegis, Columbia Flier, Business Monthly, Carroll County Times
- First member survey was sent out January 19.

Contacts with other committees:

Anneliese D'Souza liaison for Membership
William Bissett /Steve Berger for Government Relations
Scot Millen for Partners
Karen Brelsford/Lyn Dip for Programs

Other:

- Held media training with Programs committee. 10 members signed up for the Media Response Team, 5 members signed up to volunteer with other National FPA communication efforts, 1 member joined the committee.
- Working with GR Committee on America Saves Week to maximize impact for post publicizing. Helped GR draft a letter inviting legislators to participate in America Saves Week. We will provide the media with a photo opp so they can send a photographer/camera the day of and actually cover the event. We will also be sending out a release after-the-fact.

Plan of Work Progress:

- Have designed a survey to assess chapter happenings and further facilitate the dissemination of chapter information pertinent to the media. Expect survey to be used quarterly beginning in Janu 2010.
- Have sub-committees formed (radio, TV, social, print) and chairs selected.
- 2010 timeline has been created to track upcoming chapter events that will require PR Committee involvement.
- Recruited 1 additional PR Committee member YTD.
- Using individual Google News Alerts for individual press releases
- Have 1 liaison from another committee regularly participating in calls.

Concerns/Issues:

1. Need introductions to media to facilitate building relationships between this committee and media working with radio, print, TV and social networks.
2. Want to create a list of experts within the chapter to provide to media. Need names of experts and their topic of expertise.

Upcoming Committee Meetings (time, date, venue):

Conference calls at 10 am every second Friday of the month.

Succession strategy:

Brent Weiss has agreed to be the 2010 Vice Chair and 2011 Chair.

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Program Committee

Chair Pete Dixon and Celie Neville

Date January 30, 2010

Committee Member names:

Celie Neville, Pete Dixon, Jeff Merwin, Maurice Offit, Mark Stinson

New members (names) since last committee report:

None

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

None

Updates:

Monitoring progress for 2010 events.

2010 schedule would be similar to 2009, with mixture of CE, practice management and networking events.

Will once again attempt to use past leaders for events as event chairs. Program committee would remain responsible for overseeing the event chairs, as well as chair some events itself. Program committee coordinators would assist the assigned event chairs the respective event months in advance.

Initially, the committee member ensures that the date, location/venue, budgetary issues, partners, and n call date are all set and moving in the right direction. We also assist with other issues if and when needed and communicate to the current president of our progress as well.

MaryDunlap, from the Membership committee will be on our monthly calls.

Concerns/Issues:

Should program committee merge with Partners committee? For now, Partners chair will sit in on calls.

Upcoming Committee Meetings (time, date, venue):

The Program Committee had its first meeting was January 20.

The next one is slated for Feb 17 at 8:30 am

Succession strategy:

Co-Chairs Pete Dixon and Celie Neville, for 2010