

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Public Relations

Chair Joy Slabaugh

Date 6/10/2010

Committee Member names:

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

New members (names) since last committee report:

Leslie Waghorn, Elizabeth Reed

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

Updates:

Update of press releases and other communications:

- Sent press release on chapter member's community investment April 19 to Baltimore Business Journal, City Paper, Columbia Flier, Towson Times, Owings Mills Times, Baltimore Messenger, The Beacon, Baltimore Sun, The Sentinel, The Gazette, Cumberland Times-News, Frederick News Post, The Herald-Mail, The Aegis, The Mariner, Business Monthly, Chesapeake Life, Urbanite Baltimore, Baltimore Chronicle, Carroll County Times, and a Baltimore-based Associated Press reporter. (This release was compiled from the Chapter Survey.)
- Posted Super CE press release on LinkedIn under CFP Certificants group, The American College group, and Financial Careers Group.
- Initiated contact with Tiffany Needer and Paul from WMAR. Provided info on FPA experts.
- Mary Dunlap referred an Investment News reporter to us for help with a story. Introduced her to two members. Story is here:
<http://www.investmentnews.com/article/20100530/REG/305309966>
- Fielded contact from Alan Dessoff of The Daily Record for story. Introduced him to three members. Story goes online June 16.

Contacts with other committees:

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

Other:

- Working with Programs Committee to bring Media Training and the Listening Tour to the chapter.
- FPA of Maryland LinkedIn group created

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 Jan 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.
- Have identified two media relationships in Radio, TV, and Print media.
- Have initiated contact with 2 radio media members, 3 print media members, and 3 TV media members.
- Have recruited PR expert for the committee. (Leslie Waghorn is a free lance public relations professional.)

Concerns/Issues:

1. Need to fine-tune Google News Alerts in a time efficient manner or figure out an easier way to track alerts. Once this item is solved, the 2010 plan of work will be complete. The remainder of the year will be spent fine-tuning and continuing momentum.
2. Recommend hiring a public relations director to execute a specific portion of the media communications strategy. The PR committee is comprised of financial professionals with a certain understanding of media who can develop a media strategy, create valuable content, craft story ideas, build relationships with media, and provide information/stories to the media. However, our weakness is implementation; we have enormous difficulty getting the media to use our stories and print our press releases.

While the committee can attempt to strengthen this weakness, I expect it will take several years to reach proficiency in this area and think it unlikely that volunteers will participate as long as is necessary for proficiency to be reached. The alternative is to contract with an expert already proficient in this area. Should such an expert be retained, I recommend the relationship between the committee and the expert to be similar to the current relationship between the Board and the Executive Director; the committee would create the plan and develop content with input from the expert who would then implement the plan. I recommend contracting with such an expert to engage media a specific number of times over a specific time period on certain topics pertinent to Chapter and FPA issues. The effectiveness of the expert's performance would be measured by incidences of media engagement.

While the Chapter may not be able to afford such a hire at this point, I strongly recommend evaluating the feasibility for future development. Should the Board decide hiring such an expert is in the best interest of the Chapter, I think it reasonable that a portion or even all of the costs to the Chapter could be compensated by bartering services. A Public Relations expert looking to obtain financial planning clients would very likely consider sponsorship attractive

compensation for performing these duties.

Upcoming Committee Meetings (time, date, venue):

Conference calls at 10 am every second Friday of the month using the following GoToMeeting information: <https://www2.gotomeeting.com/join/359618955>
Dial in information: 218-844-4924 Access Code: 359-618-955

Succession strategy:

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

**Financial Planning Association of Maryland
COMMITTEE REPORT**

Committee Name Government Relations

Chair Craig Berman

Date 6-1-10

Committee Member names:

William Bissett (Board Member)

Crystal Cooper

Adam Freeland

Steve Berger

Susan Mitcheltree

New members (names) since last committee report:

Rebecca Altman

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

Updates:

The committee has been informally corresponding via electronic mail periodically. Craig Berman has been Participating in FPA Capitol Update calls and providing updates to board members.

Concerns/Issues:

Possibly trying to build a legislative committee hearing member list.

Upcoming Committee Meetings (time, date, venue):

Succession strategy:

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Membership

Chair Mary Dunlap

Date 6.7.2010

Committee Member names:

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

New members (names) since last committee report:

Jason Abosch

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; 4/15/2010 306 members; 5/24/2010 - 311 members

***** Decline seems to have subsided but we need to increase membership to at least above 327 (12/31/09 numbers)******

Initiatives

Retention for Current Members - Programs

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

- 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 meetings, socials and attend webinars

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.
- **We send out a card from Our Chapter recognizing their achievement and thanking them for being part of our Chapter.**

Existing Members Who Renew

- We send out a "thank you" card from our chapter for each person who renews
- We are referencing upcoming events in the card and encouraging them to go to our Chapter Webpage

Career Day - October 2010

Our committee is assigned the task of arranging for the second Career Day
We need to send out survey to all our members to encourage volunteers to help

New Members - Programs

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 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.

Surveying New Members (Presently being worked on)

- Jason Abosch and Mike Curley are creating a electronic survey to send to our first year members after their first year to find out how our chapter and the association has met their needs and what they might want going forward.
- This survey will be sent to all our new members once they have been with us for the year and after they have renewed. That way our message does not get confused with the messages from FPA National for renewing.

Other Initiatives being considered but not implemented right now:

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?**

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)

Concerns/Issues:

Determining how to follow-up with non-renewing members

Need to complete our plan of work – we are progressing

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.

Some of our members are not as active as others.

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 Partners Committee

Chair Chad Foster

Date 6/7/2010

Committee Member names:

Chad Foster, John Donohue

New members (names) since last committee report:

None

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

None

Updates:

Called all of the Premium + Level and Platinum partners to see if they would have any interest in putting on an education webinar. Chad spoke to Mike Tinati @ Petroleum & Resources and said he would be interested, Dan Reilly @ Thornburg and he said he would be interested, and Jay Schuman @ Horan Capital Management and he said he would be interested. I left a message for Donna Vail @ Chubbs and Jeff Hill @ T. Rowe Price and have not gotten a call back from them yet.

Concerns/Issues:

None

Upcoming Committee Meetings (time, date, venue):

None

Succession strategy:

None

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Program Committee

Chair Pete Dixon, Celie Neville, Chad Foster

Date June 16, 2010

Committee Member names:

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

New members (names) since last committee report:

Shariff Small and Jennifer Small

Chad Foster, formerly Chair of Partners Committee

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

None

Updates:

Monitoring progress for 2010 events.

2010 schedule is complete

We are happy to report that the events in Jan, Feb and March have been successful

We had a good turnout April 21, our next networking event at Mustang Alley

May's Super Ce program was well attended but goal not achieved.

We will not have any events in June and July

.The August Networking event , an Orioles game at Camden Yards in ready to go.

Planning for September and October events is well underway: September will be a case study.

We have merged the Programs Committee with the Partners Committee

Concerns/Issues:

Upcoming Committee Meetings (time, date, venue):

The next meeting is slated for June 16 at 8:30 am

Succession strategy:

Co-Chairs Pete Dixon and Celie Neville, for 2010

2011 needs to be determined