

**Financial Planning Association of Maryland
COMMITTEE REPORT**

Committee Name Government Relations

Chair William Bissett

Date November 11, 2008

Committee Members:

Craig Berman, Crystal Alford-Cooper, Jim Ludwick, Adam Freeland, Mike Calabrese

New Members as of last committee report:

Members that have left since last committee report:

Updates:

- 1) We have booked Anirban Basu and Harry Browne's for our FPA Day in Annapolis.
- 2) Mike Curley and I met with Craig to talk to him about the responsibilities of the committee chair.
- 3) Craig has effectively taken over duties of the committee chair.

Upcoming Events:

- 1) We need to continue staying in touch with the legislators who came to Annapolis.

Concerns/Issues:

Upcoming Committee Meetings (time, date, venue):

November 21 at 9:30am .

Succession strategy:

Craig Berman will be succeeding me in this role.

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Partners

Chair Lori Silverthorne

Date 11/6/08

Committee Member names:

Lori Silverthorne (chair)
Rosemarie Cohen
John Danz
Tres Hughes

New members (names) since last committee report:

none

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

none

Updates:

-All existing partners have been given the opportunity to take advantage of 2009 partner benefits with the FPA of MD. They had until October 31st, to give their indication of interest. My next step is to reach out to the new potential partners with details.

Upcoming Events:

Concerns/Issues:

-Having difficulty getting committee members to participate on monthly calls. Considering a face-to-face meeting to discuss 2009 benefits.

Upcoming Committee Meetings (time, date, venue):

Nov 14th

Succession strategy:

**Financial Planning Association of Maryland
COMMITTEE REPORT**

Committee Name Public Relations

Chair Mike Curley (Acting)

Date November 14, 2008

Committee Members:

Joy Slabaugh, Renee Green

New Members as of last committee report:

Joy Slabaugh (11/4), Renee Green (9/24)

0

Members that have left since last committee report:

Pat Monaghan

Updates:

With the addition of two committee members in the last 41 days, there should be an adequate nucleus of human capital to draft a plan of work in December 2008 for implementation in 2009.

Upcoming Events:

None

Concerns/Issues:

With an entirely new cast of committee members, this provides an excellent opportunity to cast the group as a Communications Committee, which is composed of PR and *intra*-chapter communications components.

Upcoming Committee Meetings (time, date, venue):

None

Succession strategy:

Not yet identified.

Financial Planning Association of Maryland COMMITTEE REPORT

Committee Name Program

Chair Mike Curley (acting)

Date November 14, 2008

Committee Members:

Doug Jones; Pam Gilmour; Jeff Merwin; Pete Dixon, Celie Neville, Ken Franklin

New Members as of last committee report:

Ken Franklin

Members that have left since last committee report:

None

Updates:

October 16 seminar

- survey results can be seen at

http://www.surveymonkey.com/sr.aspx?sm=0Aq6Nyae23pu2NLgzyV7OR_2fjochSGtMHgkO9Txx_2b8UU_3d

- seminar recap

Total reservations	39
No-shows	6
Walk-ups	12
Total attendees	45
No-charge/prospective member guests *	0
No-charge/other guests *	0
Interpreter no-charge guests*	0
Speaker no-charge guests *	5
Partner no-charge guests *	7

* included in total attendees

November 13 seminar

- survey results can be seen at

http://www.surveymonkey.com/sr.aspx?sm=S9eWorzHEVFBOOnUdVnQ170IJizuDgSNvwgV37gPaoPO_3d

- seminar recap

Total reservations	62
No-shows	8
Walk-ups	4
Total attendees	58
No-charge/prospective member guests *	0
No-charge/other guests *	1
Interpreter no-charge guests*	2
Speaker no-charge guests *	4
Partner no-charge guests *	7

* included in total attendees

Upcoming Events:

December 11 CE seminar at 7:30 AM in Cockeysville

Concerns/Issues:

I'm uncertain about my Program Committee *management* role for the balance of 2008 (regarding the 2009 events) as we transition to the new CEO. I want to support the efforts of Charlie, the committee members, and the event chairs as they plan (and ultimately implement) the events for the new year, while avoiding confusion on the part of the committee members regarding who is providing the direction for their efforts. It will be helpful if Charlie gives *me* clear direction my intended role.

Upcoming Committee Meetings (time, date, venue):

November 19, 2008 at 3:30 via teleconference

December 17, 2008 at 3:30 via teleconference

Toll free # is 877-643-6951/participant passcode is 49361102#

Succession strategy:

Find a permanent committee chair.

**Financial Planning Association of Maryland
COMMITTEE REPORT**

Committee Name: Membership

Chair:

Retention – Mary Dunlap

Recruitment - None

Date: 11/16/2008

Retention and Recruitment Committee Members

<i>Name</i>	<i>Relationship Ambassador for Month's Members</i>
Sharon Seal	September
Glen Ankenbrand	Eastern Shore Members
Jean Dunn – T Rowe Price	
Edric McSween – Ameriprise Financial	
Mary Dunlap	March

Retention and Recruitment Committee Members Joining: 2 – Jean Dunn and Edric McSween

Retention Committee Members Leaving: None

Member Services:

Education Outreach: George Jankiewicz/FPA of MD – Chair

Ronn Nuger/UMBC and AACC

Tyler Claggett/Salisbury U (Tyler will be on sabbatical from the university during the 2008 – 2009 school year and will not be available in the committee's work during that time.)

Dwight Mikulis/FPA of MD

Kim Magaha/FPA of MD

Cindy Malament/Salisbury U

Pat Rudolph/FPA of MD

Strategic Meeting 9/26

- Started to work on initiatives for new year 2009
- Very good session attended by Sharon Seal (committee member) and also George Jankiewicz (Education Outreach Chair for 2008)
- Continuing with our new members to complete the 2009 plan for the Membership Committee

FPA Membership Chair Call-In

September 18

- Membership Chairs from various chapters call-in to discuss issues and share ideas.
- Issues discussed: Changing rules regarding the names of new CFP certificants given by the CFP Board to national FPA.
- The CFP board wants FPA to use the new names once in a mailing only UNLESS the CFP certificant has indicated that he/she wants to receive information and further communication from FPA.
- More information clarifying this decision is coming shortly.

FPA Chapter Leader Best Practices – Engaging Student Members

October 21

Discussed “Best Practices” from different chapters - ideas included:

- Student Involvement in Chapter
- Asking Students to volunteer and just do “one thing” at FPA chapter meetings – such as greeting, calling, etc.
- Student - “Career Day in a Toolbox” Kit - created by Caleb Brown and available on the FPA website
- Students come to an FPA meeting –where part of the program is “Career Day” – logistics set up for employers and students to meet, and part of the program is a continuing education session.
- Colorado chapter - holds meetings especially for students – in particular for those studying for CFP. Each meeting covers one part of the CFP curriculum.

FPA Leadership Conference

Nov 7 through 9

- M Dunlap attended the membership committee track and Jeff Lang was also there as a meeting advisor. Shaun Eddy, Jaleen Edwards – moderated
- Wonderful to learn best practices from among chapters.
- M Dunlap to discuss results with committee members.

Concerns/Issues

1. Low Manpower – is being addressed as we have new members but need to recruit more.
2. Great ideas – now we need to strategically plan for 2009.
3. **There were 2 positive, idea-generating phone conferences attended by Mary Dunlap**
 - a. June 26 – FPA membership committee chairs call-in for discussion on ideas to recruit and retain members
 - b. July 29, 2008 - Chapter Leader Best Practices: Membership
 - i. Jaleen Edwards, FPA, Tricia Rieple, FPA and Jacqui Friedrich, FPA of W. North Carolina, Rick Mayo, FPA of Hampton Roads

4. Some worthwhile issues that the committees and board should discuss to recruit and retain members (as well as volunteers). (Note – we may already be doing some of this). This is based on the calls mentioned above.

a. Recruit:

i. Member Get a Member

1. Make it an internal contest for the local chapter
2. Begin the announcements about the contest early
3. Suggest to members ideas about who they can contact to get to be a member
4. Award prizes to chapter members for recruitment contest objectives --- as example --- the most referrals, the most unusually obtained, etc.

ii. Use our Toolkits

1. Order the FPA national membership marketing supplies ----- for example 108 Benefits of Membership, etc. – have someone responsible for ordering supplies and bringing to all meetings and events

iii. Capture the CFP certificants

1. Find out where the CFP exams are held and wait for the exam to end – hand out materials (FPA membership packets) & take CFP certificants to eat, drink after the exam to talk about the exam, their career and how the FPA can help.

iv. Colleges who offer financial planning courses

1. Go to colleges and talk to professors and department heads that run the programs – conduct some classes as part of the curriculum.
2. Go to career center and meet career counselor - talk about how the FPA can help college graduates make their financial planning careers a success.

v. Contact Allied Professionals

1. Identify allied professionals – such as mortgage industry, attorneys, accountants, banks – the FPA member contacts the allied professional and meets them for FPA meetings and also introduces the current membership campaign for allied professionals.
2. Send invites and follow-up with call or meeting
3. Utilize the allied professionals as speakers for FPA meetings on topics that are important to the FPA memberships.
4. Also use the chapter partners who sponsor FPA – have them as speakers or allow them to bring speakers, etc.

- vi. Gen X Practice Development
 - 1. Topics relevant to Gen X people
 - 2. Have a theme for meetings or special study sessions
- vii. Offer Free Ethics Course to New Members
 - 1. Membership Orientation Event
- b. Membership Retention – Appreciation
 - i. Survey membership – take 3 to 5 minutes and have attendees physically complete the survey and collect them right away.
 - 1. Offer prize drawing for completed surveys
 - ii. Rotate locations and timing of meetings
 - iii. Having Afternoon sessions and then FPA happy hours afterwards
 - iv. “FPA after 5” – Happy hours every other month. Invite new members and introduce them to people.
 - v. Renewing members appreciation events
 - vi. Web casting of meeting and events so that members who could not attend could listen in
 - vii. Buddy System – for meetings, happy hours
 - 1. Identify new members and visitors to events – introduce them and be with them during events
 - viii. FPA national chapter has sample surveys,
- c. Components of a successful membership committee
 - i. Welcome Wagon
 - 1. See how the rotary organization does this
 - ii. Call people who leave – “The Grim Reaper”
 - iii. Create Pro Bono Groups, Study Groups – Special Interest Groups
 - 1. Have events to create a special interest group – so that people get connected and involved

Upcoming Committee Meetings (date, time and venue): New time based on contacting existing membership committee members – third Monday of each month at 4pm. Reminders have and will continue to go out.