

# 2010 Roadmap to Success

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## Application User Notes and Tips

This is a new MS Word version of the Roadmap to Success application. Hopefully you will find this version to be more user-friendly than earlier versions. We encourage you to try out the application early rather than waiting until shortly before the submission deadline.

If you have questions or technical issues with the electronic application, please give Jennifer Harris a call at (800) 322-4237 x7303.

### Application user notes and tips:

- Text in **burgundy** is example or instructional text for that form field. For example: “Completed/Scheduled for: **01/10/2010** (date of 2011 planning meeting).” This field is looking for a date.
- The check boxes are toggle fields. Click on a box to check/uncheck the box.
- You can tab from field to field. When you complete one field click your **tab** button to take you to the next field.
- To enter text in a form field
  - **tab** to the next field and type in the appropriate data, or
  - **left click** on the form field to highlight the entire field, or
  - you may need to **double left click** to get the entire field highlighted
- To paste text into one of the form fields, **copy** the text you want to insert then
  - **left click** on the form field and **CTRL V** to paste; or
  - **left click** on the form field and **right click** and select **paste** from the drop down menu.
- *Please* make all your changes to the document in **burgundy** colored text to make it easier for the reviewers to identify the information that you are submitting.
- To open web site links in the application, try one of the following methods:
  - **Click** on the link
  - **CTRL + click** on the link
  - **Right click** on the link, select **copy hyperlink**, then **paste** the link into your internet browser
- **Pages 3-11** are the Roadmap to Success application
- The optional Outstanding Achievement Awards applications are **pages 12-27**.
- **Remember**, Outstanding Achievement Award submission is not required for Roadmap to Success but **you must submit completed form(s) for consideration for Outstanding Achievement Award(s)**. A completed application for each activity you wish to have considered for an Outstanding Achievement Award is required. Incomplete applications will not be evaluated.

**Submission Due: August 31, 2010**

# 2010 Roadmap to Success

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## Guidelines for Submission

We trust that your chapter's submission is complete and accurate. (All information must be within July 1, 2009 and June 30, 2010, unless otherwise stated.)

1. Indicate if your chapter is applying for the Roadmap to Success program.
2. Indicate which board members were involved in the completion of the application. A minimum of two board members (not including paid staff) must have been involved.
3. If your chapter is also submitting good ideas (aka: best practices) for an Outstanding Achievement Award, please complete an application for each submission.
4. Submit proof of all requested information per criteria.
5. The completed application and required supporting information must be postmarked by August 31, 2010 and/or received electronically by COB August 31, 2010.

We encourage you to complete the electronic application form and submit, as much as possible, the supporting documentation as links to web pages and by e-mail.

## Submissions due August 31, 2010

The completed application and all required supporting information must be received electronically and/or postmarked by COB August 31, 2010.

Mail to:

Attn: Chapter Relations Department  
2010 FPA Roadmap to Success  
Financial Planning Association  
4100 E. Mississippi Avenue, Suite 400  
Denver, CO 80246-3053

E-mail to:

Jennifer.Harris@FPAnet.org

For more information or questions, contact FPA Chapter Relations at 800-322-4237, ext. 7303.

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## Submission Form

Submit the names and board position of two volunteer leaders (not paid staff) who were involved in the completion of the 2010 Roadmap to Success application whom we can contact with any questions.

**Scot Stark, MBA, CMFC, CFP®, President**

**William Bissett, CFP®, President Elect**

## Chapter Operations

**Required. There are no optional items in this category.** *(Check all completed activities)*

- FPA Chapter Officer/Director Fact Sheet 2010-11.** Sent to National on **12/31/2009**
- Chapter Officers Job Descriptions:** Submit job descriptions for all officer positions and committee chairs for 2010. **SEE ATTACHMENT** *(link to job descriptions or send to national by e-mail or mail)*
- Financial Statement:** Include a mid-year 2010 (June 30) financial statement. Must include balance sheet, profit and loss (P&L) statement and projected budget. **SEE ATTACHMENT** *(Link to financial statement or send to national by e-mail or mail)*
- Strategic Planning Meeting:** Provide the date you held or are planning to hold your chapter's strategic planning meeting for **2011**. Completed/Scheduled for: **9/24/2010** *(date of 2011 planning meeting)*.
- Chapter Web site:** Provide your chapter's current Web site address. Your chapter's Web site must be active, current, and adhere to FPA's branding guidelines. **[www.fpamd.org](http://www.fpamd.org)**

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## Chapter Leadership

**Required. There are no optional items in this category.** *(Check all completed activities)*

- Mission and/or Vision Statement(s):** Submit your chapter's written mission and/or vision statement(s). Mission and/or vision statement(s) must be aligned with FPA's Primary Aim; visit <http://www.fpanet.org/AboutFPA/Organization/CoreBeliefs/> for details. **SEE ATTACHMENT** *(link to document or send to national by e-mail or mail)*
  - Mission:** answers the questions about why an organization exists, what business it is in and what values guide it.
  - Vision:** answers the question, "What will success look like?" It is a shared image of success that inspires and motivates people to work together for a common cause.
- Participation in FPA Chapter Leaders Conference:** Provide the names of chapter officers who will attend FPA Chapter Leaders Conference 2010, November 5-7, at the Omni Interlocken Hotel in suburban northwest Denver, Colorado. The individuals listed must be volunteers, not paid staff. (Please note: if your chapter submits chapter officers who will attend FPA Chapter Leaders Conference and then they are unable to attend, this may result in disqualification of this criterion.) **SEE ATTACHMENT** *(or send to national by e-mail or mail).*
- Written Strategic Plan:** Submit your chapter's 2010 strategic plan. The strategic plan *must* include goals, objectives and timelines. For a plan of work template, visit <http://www.fpanet.org/Connect/Chapters/ChapterLeadershipResources/LeadershipPrinciples/> **SEE ATTACHMENT** *(link to document or send to national by e-mail or mail)*
- Participation in FPA Leadership Training:** Submit the names of chapter officers whom, in 2010, completed the online Leadership System Training via the Virtual Learning Center (VLC) at <http://www.fpanet.org/Connect/Chapters/ChapterLeadershipResources/LeadershipVirtualLearningCenter/>. Contact Chapter Relations at 800.322.4237, ext. 7135 with questions. *(NOTE: all new Board members must complete the Leadership Training for credit.)* **SEE ATTACHMENT** *(or send to national by e-mail or mail)*
- New Committee(s) and/or Board/Committee Members:** Submit the names of all new 2010 board or committee members and all new committees formed in 2010. **SEE ATTACHMENT** *(link to document or send to national by e-mail or mail)*

**Submission Due: August 31, 2010**

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## Public Relations and Public Awareness

According to the *American Heritage Dictionary*, **public relations** is the art and science of establishing and promoting a favorable relationship with the public. Media relations is working proactively and reactively to position FPA as a trusted source with editors, reporters and producers.

**Public awareness** is working directly with the public to promote financial planning. Public awareness can take several forms, including establishing and maintaining a speakers bureau and participating (via exhibiting or speaking engagements) at public events.

**Pro bono** is defined as providing free financial planning advice and service to underserved and/or disaster-stricken consumer populations.

**Required** (*check all completed activities*)

- Promote the Value of Financial Planning:** Provide a detailed description of **two** activities conducted in 2010 that promoted the value of financial planning to the public via media relations or public awareness efforts. Include specifics regarding dates, activity format, content, intended audience, use of media outlets, etc. The submission **must include one** of the following examples related to promoting the value of financial planning:
  - Public service announcements to local media (*Please include where public service announcements were distributed and aired.*) **Highlight this field to enter event/ program details including the name(s) of involved chapter members, how many consumers were served and the date and location of the event/program. (link to document or send to national by e-mail or mail)**
  - Secure coverage of chapter in local media (*May include use of Financial Planning Perspective (FPP) article series, Q&A columns, money makeovers and/or event announcements. Provide one sample of coverage.*) **SEE ATTACHMENT (link to sample or send to national by e-mail or mail)**
  - Participate in a local public event (*May include chapter's participation as an exhibitor at a public event, public seminars conducted by the chapter or speaking opportunities directed to a consumer audience secured by the chapter. Provide the name, date and estimated audience size at the event.*) **SEE ATTACHMENT (FPA Goes to Annapolis)**
  - Pro bono efforts (*Submission must be provided in detail, including the name(s) of involved chapter members, how many consumers were served and the date and location of the event/program.*) **Highlight this field to enter event/ program details including the name(s) of involved chapter members, how many consumers were served and the date and location of the event/program.**

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## Public Relations and Public Awareness

**Optional** (*check all that apply*) **Two of the criteria below must be completed to meet the requirements for this category**

- Public Affairs Activities:** FPA considers public affairs to include work with legislators, regulators and government officials. Provide a detailed description of the chapter activity that educated legislators and regulators about the value of financial planning. Please include specifics regarding dates, activity format, content, intended audience, use of media outlets, etc. Qualifying activities include but are not limited to:
- Participation in a state Capitol Hill Day. **SEE ATTACHMENT**
  - Lobbying at the state level. **Highlight this field to enter text**
  - Regulators, legislators or public officials speaking at a chapter event. **Highlight this field to enter text**
  - Other (please describe): **SEE ATTACHMENT**
- Financial Planning Week** Provide a detailed description of one of the following Financial Planning Week activities. Please include specifics regarding scheduled dates, activity format, content, intended audience, use of media outlets, etc. *For more information about Financial Planning Week, visit <http://www.fpaforfinancialplanning.org/WhatIsFinancialPlanning/FinancialPlanningWeek>, or contact Becca Vrabak at 800.322.4237, ext. 7187, or e-mail [Becca Vrabak](mailto:Becca.Vrabak).*
- Mayoral proclamations (*provide copy of signed proclamation*) **Highlight this field to enter link or information** (*link to document or send to national by e-mail or mail*)
  - Gubernatorial proclamations (*if this is a joint effort with other chapters, please state which chapters*) **Highlight this field to enter link or information** (*link to document or send to national by e-mail or mail*)
  - Hotlines and/or online chats (*provide advertisements or chat screenshots*) **Highlight this field to enter link or information** (*link to document or send to national by e-mail or mail*)
  - Public service announcements on radio or television (*provide where public service announcements were distributed and will be aired*) **Highlight this field to enter link or information** (*link to document or send to national by e-mail or mail*)
  - Chapter members speaking on behalf of FPA for a local organization or group (*provide the name, date and estimated size of audience at the event*) **Highlight this field to enter event name, Highlight this field to enter event date, Highlight this field to enter estimated audience size.**
  - Other (please describe): **SEE ATTACHMENT**

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- FPA – Political Action Committee (FPA–PAC):** Provide one newsletter or meeting notice of activities and/or communication creating awareness of FPA–PAC. **SEE ATTACHMENT** (Link to document or send to national by e-mail or mail)
- Foundation for Financial Planning:** Provide one newsletter or meeting notice of activities and/or communication creating awareness of the Foundation for Financial Planning. **SEE ATTACHMENT** (Link to document or send to national by e-mail or mail)

## Member Outreach

### Required

- Education:** Provide a detailed description of all the educational opportunities you provide to your chapter members. It is not necessary that they qualify for continuing education credit(s). **SEE ATTACHMENT** (Link to document or send to national by e-mail or mail)
- Chapter Communications:** Provide **one printed copy** of your chapter’s newsletter (printed or electronic) or meeting notice. If meeting notices are included within the newsletter, then only submit the newsletter. **SEE ATTACHMENT** (Link to document or send to national by e-mail or mail)
- Associated Professional Outreach:** Submit a detailed description, outline and results (or anticipated results) of your chapter’s program to reach out to associated professionals — *must include samples of outreach*. The following are some examples:
  - Alliances and strategic partnerships with associated professional organizations, i.e National Association of Insurance Financial Advisors (NAIFA), Society of Financial Service Professionals (SFSP), Estate Planning Council . **SEE ATTACHMENT** (Link to document or send to national by e-mail or mail)
  - Joint meetings and symposiums with associated professional organizations **Highlight this field to enter program description, outline and results/anticipated results and/or link(s).** (Link to document or send to national by e-mail or mail)
  - Reciprocal publication of meeting notices in newsletters and/or Web sites **Highlight this field to enter program description, outline and results/anticipated results and/or link(s).** (Link to document or send to national by e-mail or mail)
  - Offering topics of interest to associated professionals during meetings **SEE ATTACHMENT** (Link to document or send to national by e-mail or mail)
  - Specific networking opportunities **Highlight this field to enter program description, outline and results/anticipated results and/or link(s).** (Link to document or send to national by e-mail or mail)

**Optional** One of the criteria below must be completed to meet the requirements for this category

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- Professional Development:** Submit a **detailed description**, outline and results (or anticipated results) of your chapter's program for professional development. The following are some examples:

Mentoring and/or internship programs **Highlight this field to enter program description,**

**outline and results/anticipated results and/or link(s).** (*Link to document or send to national*

*by e-mail or mail*)

- Relationship with faculty and student group of local colleges/universities offering financial planning degree programs or CFP® certification programs **SEE ATTACHMENT** (*Link to document or send to national by e-mail or mail*)

- Job posting programs **SEE ATTACHMENT** (*Link to document or send to national by e-mail or mail*)

CFP® certification exam study groups or other study groups **Highlight this field to enter**

**program description, outline and results/anticipated results and/or link(s).** (*Link to document or send to national by e-mail or mail*)

- Scholarship Program(s):** Submit detailed materials documenting your chapter's implementation of or development plan for offering some type of local scholarship program, i.e. CFP® Certificate Scholarship or other chapter scholarship programs. Please include dates and names of scholarship recipients and/or expected date of scholarship award — *all documentation and recipient name(s) must be included.* **SEE ATTACHMENT** (*Link to document or send to national by e-mail or mail*)

- Chapter Member Recognition:** Awards, honors, etc., designed to recognize local chapter members. Examples include recognizing membership anniversaries and the chapter giving local Heart of Financial Planning Awards.

<http://www.fpanet.org/Connect/Chapters/ChapterAdministrationTools/ChapterRelations/#localawards> **SEE ATTACHMENT**

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## Member Recruitment and Retention

**Required** (check all completed activities)

**Membership Recruitment:** Submit a detailed description and outline of your chapter's membership recruitment campaigns. The following are some examples of tactics that might be part of your plan:

Member-Get-A-Member campaign **SEE ATTACHMENT** (Link to document or send to national by e-mail or mail)

Using materials from the national office for recruitment campaigns **Highlight this field to**

**enter campaign description and outline and/or link(s).** (Link to document or send to national by e-mail or mail)

Membership promotion to nonmember CFP® professionals **SEE ATTACHMENT** (Link to document or send to national by e-mail or mail)

Membership promotion to associated professionals **SEE ATTACHMENT** (Link to document or send to national by e-mail or mail)

Co-marketing efforts with associated professional organizations **Highlight this field to**

**enter campaign description and outline and/or link(s).** (Link to document or send to national by e-mail or mail)

Contacting members one-on-one **Highlight this field to enter campaign description and**

**outline and/or link(s).** (Link to document or send to national by e-mail or mail)

Membership outreach program to associated professionals **SEE ATTACHMENT** (Link to document or send to national by e-mail or mail)

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**Membership Retention:** Submit a detailed description and outline of your chapter's membership retention campaign. The following are some examples of tactics that might be part of your plan:

FPA national retention pieces at meetings    **Highlight this field to enter campaign**

*description and outline and/or link(s). (Link to document or send to national by e-mail or mail)*

Phone follow-up with members who are due to renew    **SEE ATTACHMENT** *(Link to document or send to national by e-mail or mail)*

New member program, including welcome, orientation, etc.    **SEE ATTACHMENT** *(Link to document or send to national by e-mail or mail)*

Contacting members one-on-one    **SEE ATTACHMENT** *(Link to document or send to national by e-mail or mail)*

Member benefit updates    **Highlight this field to enter campaign description and outline**

*and/or link(s). ). (Link to document or send to national by e-mail or mail)*

**Outreach to Nonmember CFP® Certificants and Prospective CFP® Certificants:** Submit a detailed description of your chapter's outreach efforts to recruit nonmember CFP certificants and prospective CFP professionals within your chapter's geographic area. The following are some examples of tactics that might be part of your plan:

Inviting nonmember CFP professionals to meetings and to join    **SEE ATTACHMENT** *(Link to document or send to national by e-mail or mail)*

Establishing relationships with local college/university faculty that offer a CFP Board-approved CFP® certification program    **SEE ATTACHMENT** *(Link to document or send to national by e-mail or mail)*

**Submission Due: August 31, 2010**

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## Member Recruitment and Retention

- ☒ **Membership Development Committee:** Provide a membership development committee job description and strategic plan of work. We suggest using this plan of work to include activities listed above in the Membership Recruitment and Retention section. At a minimum, you must outline strategies, tactics, responsibilities, goals and results. A tactic might be to coordinate a new member orientation program, which includes a new member breakfast or luncheon, welcome letter, follow up plan, etc. *Submission must include a detailed plan of work and a list of participating committee member names. **SEE ATTACHMENT** (or send documents to national by e-mail or mail)*
  
- ☒ **Membership Growth and Retention:**  
Please provide a description of your chapters membership goals and results:  
Timeframe: July 1, 2009, through June 30, 2010. Note, while the Task Force stresses the importance of reaching goals, meeting the goals is not required. Creating and executing a comprehensive plan are the emphasis in this category.

### **Membership Growth**

Goal: **SEE ATTACHMENT**

Results: **SEE ATTACHMENT**

### **Membership Retention**

Goal: **SEE ATTACHMENT**

Results: **SEE ATTACHMENT**

**Submission Due: August 31, 2010**

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## Exceptions, Appeals, Special Circumstances, Comments

### Not Required

Submit a detailed narrative of your chapter's request for exception, appeal, special circumstance or comments. The narrative must include an explanation of why you feel your chapter should be considered for an exception or has had special circumstances that should be addressed. The narrative must be submitted on this page in legible writing. Provide a contact name and number in case the task force needs clarification.

Contact Name: *Highlight this field to enter name.*

Contact E-mail: *Highlight this field to enter e-mail.*

Please indicate: Exception/ Appeal /Special Circumstance Comment

*Highlight this field to enter. Please note: this field is restricted to 1500 characters (about 250 words in length.)*

**Submission Due: August 31, 2010**

# 2010 Roadmap to Success

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## Outstanding Achievement Award Submission

*Outstanding Achievement Award submission is not required for Roadmap to Success but **you must submit a completed form for consideration for an Outstanding Achievement Award.** You must submit a completed application for **each** activity you wish to have considered for an Outstanding Achievement Award. Incomplete applications will not be considered.*

Submit a detailed narrative of your chapter's outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter's achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please indicate the categories in which you are submitting application(s) for Outstanding Achievement Award(s). A completed application for **each** activity you wish to have considered for an Outstanding Achievement Award is required. You may submit for as many of the following categories as you choose.

- Career Development
- Diversity
- Financial Literacy
- Financial Planning Week
- Government Relations/Advocacy
- Innovative Education
- Leadership Development
- Membership
- Partnering with Like-Minded Organizations (relationships with corporate partners and other organizations)
- Public Awareness
- Public Relations
- Pro Bono
- Student Involvement
- Technology/Web Site Development
- Other (chapter outreach, awards for outstanding service, etc.)

Submission Due: August 31, 2010

# *2010 Roadmap to Success*

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## **Outstanding Achievement Award Submission**

Submission Category: **Government Relations/Advocacy**

Examples of programs that are in the Government Relations/Advocacy category include; activities that represent members' interests before federal and state regulators and lawmaking bodies to leverage a more unified voice on issues affecting financial planning and programs that assist members in advocating for their interests and the interest of the financial planning profession.

**SEE ATTACHMENT**

**Submission Due: August 31, 2010**

# 2010 Roadmap to Success

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## Outstanding Achievement Award Submission

Submission Category: **Diversity**

FPA seeks to raise awareness and promote an environment that embraces diverse communities – of consumers and professionals. In so doing, FPA strives to increase opportunities and access for the widest spectrum of people so that all may join, collaborate and thrive within an inclusive financial planning community. Complete Diversity Statement <http://www.fpanet.org/docs/assets/DiversityStatement.pdf>

A successful submission in this category supports and advances FPA’s diversity as defined in the FPA Diversity Statement.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter’s outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter’s achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500 words).

**Submission Due: August 31, 2010**

# 2010 Roadmap to Success

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## Outstanding Achievement Award Submission

Submission Category: **Career Development**

The Financial Planning Association supports career development and the growth of the next generation of financial planners. This category includes activities that give new planners and financial planning student's perspective on the profession and understanding of career opportunities. Activities which assist planners, in any stage of their career, in developing their career path would also be included in this category.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter's outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter's achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500

words).

**Submission Due: August 31, 2010**

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## Outstanding Achievement Award Submission

Submission Category: **Financial Literacy**

Programming and activities that promote a basic understanding of financial concepts, the importance of financial planning and the industry to the public would be included in this category.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter’s outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter’s achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500 words).

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## Outstanding Achievement Award Submission

Submission Category: **Financial Planning Week**

During Financial Planning Week, FPA strives to build public awareness of the financial planning process, enabling individuals to make prudent financial decisions to achieve their life goals and dreams. This category includes (but is not limited to) education, public events, public awareness campaigns and other activities in support of Financial Planning Week.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter’s outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter’s achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

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## Outstanding Achievement Award Submission

Submission Category: **Innovative Education**

Continuing education initiatives that target unique populations, create exceptionally successful programs, or unique methods of providing education would all be appropriate submissions in this category.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter’s outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter’s achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500 words).

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## **Outstanding Achievement Award Submission**

Submission Category: **Leadership Development**

Activities which encourage strong leadership at a chapter level, including volunteer recruitment, developing new leaders, and succession planning would be included in this category.

**SEE ATTACHMENT**

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## Outstanding Achievement Award Submission

Submission Category: **Membership**

Chapter activities that develop strong membership loyalty, recruit and retain members, and contribute to membership growth at the chapter level would be included in this category.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter’s outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter’s achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500 words).

**Submission Due: August 31, 2010**

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## Outstanding Achievement Award Submission

Submission Category: **Partnering with Like-Minded Organizations**

Joint meetings and symposiums with associated professional organizations, reciprocal publication of meeting notices in newsletters and/or Web, joint networking opportunities and joint publicity or lobbying activities are examples of topics from this category.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter’s outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter’s achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500 words).

**Submission Due: August 31, 2010**

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## Outstanding Achievement Award Submission

Submission Category: **Public Awareness**

Public awareness is working directly with the public to promote financial planning. Public awareness can take several forms, including establishing and maintaining a speakers bureau and participating (via exhibiting or speaking engagements) at public events. These activities and other public awareness activities would be included in this Outstanding Achievement Award category.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter’s outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter’s achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500 words).

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## Outstanding Achievement Award Submission

Submission Category: **Public Relations**

Activities which establish and/or promote a positive relationship with the public would be included in this category.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter's outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter's achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500 words).

**Submission Due: August 31, 2010**

# 2010 Roadmap to Success

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## Outstanding Achievement Award Submission

Submission Category: **Pro Bono**

Activities and events such as providing free financial planning advice and service to underserved and/or disaster-stricken consumer populations would be included in this category.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter's outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter's achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500 words).

**Submission Due: August 31, 2010**

# 2010 Roadmap to Success

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## Outstanding Achievement Award Submission

Submission Category: **Student Involvement**

Chapter events or programs that develop relationships with faculty and student groups of local colleges/universities offering financial planning degree programs or CFP® certification programs including mentoring and/or internship programs, developing a student chapter, job posting, CFP® certification exam study groups or other study groups are examples of submissions that would be included in this category.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter’s outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter’s achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500 words).

**Submission Due: August 31, 2010**

# 2010 Roadmap to Success

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## Outstanding Achievement Award Submission

Submission Category: **Technology/Web Site Development**

Unique member benefits using technology or Web sites, dedicated websites for events/activities, usage of social media would all be included in this category.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter’s outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter’s achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500 words).

**Submission Due: August 31, 2010**

# 2010 Roadmap to Success

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## Outstanding Achievement Award Submission

Submission Category: **Other**

Any submission that does not belong in another category can be submitted for an Outstanding Achievement Award in the other category.

**Highlight this field to enter narrative** – Submit a detailed narrative of your chapter's outstanding activities leading to extraordinary achievement in any or all of the areas below. The narrative must be less than 500 words and include no more than three attachments each. The narrative should include an explanation of **why you feel your chapter's achievement is exceptional**, goals, results and supporting materials as appropriate. Describe each of the following: quantifiable goals and results, member involvement in the success of the effort, what the chapter is doing to ensure the effort will be ongoing (leaving a legacy for the future) and how the effort can be duplicated by most any chapter.

Please note that the narrative is restricted in size to no more than 3000 characters (approximately 500 words).

**Submission Due: August 31, 2010**