Financial Planning Association of Maryland
COMMITTEE REPORT

Committee Name **Government Relations**

Chair **Craig Berman**

Date **6-1-09**

Committee Member names:
William Bissett (Board Member)
Crystal Cooper
Adam Freeland
Michael Calebrese
Steve Berger

New members (names) since last committee report:
Steve Berger

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

Updates:

Craig Berman had telephone conversations with Duane Thompson regarding FPA legislative grass roots effort.

Craig Berman participated in the May legislative conference call with Dan Barry.

Concerns/Issues:

Upcoming Committee Meetings (time, date, venue):

A June meeting will be scheduled. This would be a phone based meeting. We will also talk about anything that the committee members are interested in getting involved with from a legislative standpoint and the November CE event.

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 Membership

Chair Mary Dunlap

Date 6/4/2009

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 (student member)

New members (names) since last committee report:

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

Updates:
Initiatives

1) Outreach to Broker Dealers
   a) First outreach has begun
      i) Outreach to Ameriprise Financial
      ii) Ameriprise Financial Representatives were at the 4/22 lacrosse event
      iii) We developed a follow-up plan whereby an influential Ameriprise regional manager who attended the lacrosse game is planning to send a letter/email to all local Ameriprise advisors in his region recommending that the advisors join the chapter. Edric is working on the letter.
      iv) We also plan to find the way to present at an Ameriprise event soon as a follow-up.
   b) Thank you to Edric McSween, Dave Forman and Brett Lambert for inviting Ameriprise Representatives
   c) Thank you to Sharon, Neil and Mike for helping with the logistics

Results: We are already seeing Ameriprise advisors joining. I believe 4 of the new members this past month are from Ameriprise. These were Ameriprise advisors at the lacrosse game.

2) New Member Welcome Initiatives
   a) New Member Breakfasts have been and continue to be successful in reaching new members and gaining volunteers for the committees.
      i) Thank you to Mike Curley (for successfully persuading new members to join a committee), board and committee members who attend the breakfasts.
   b) Thank you to the following existing chapter members who have volunteered to be ambassadors at chapter events to greet, meet and introduce new members to existing members.
      i) Crystal Alford-Cooper
      ii) William Bissett

   iii) Adam Freeland
   iv) Joe Garrison
   v) Dwight Mikulis
   vi) Lena Nebel
   vii) Scot Stark
   viii) Charles Wolpoff
   ix) Michael Kitces
   x) George Jankiewicz
   xi) John Teichmoeller
   xii) Mary Dunlap
   xiii) King Hurlock

c) Bob Cassel (our committee member) is running the Ambassador program

3) Career Day
   a) George Jankiewcz and Mary Dunlap have secured a location for the Career Day event --- Thursday October 8 at Towson University

   b) We are working on advertising to Students as well as ongoing programs to promote the event and prepare students for understanding the industry, how to interview and what to expect or make of the internship or full-time position
   c) We are also preparing advertising and materials for our chapter members on hiring, training and developing the next generation of planners --- using students to help them become successful.

Concerns/Issues:

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.

Next meeting in June will discuss the follow-up to the lacrosse event and also determine any other outreaches possibly using the Baseball social event.

Succession strategy:

Not yet

Financial Planning Association of Maryland
COMMITTEE REPORT

Committee Name Public Relations

Chair Joy Slabaugh

Date 6/2/2009

Committee Member names:

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

New members (names) since last committee report:

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

N/A

Updates:

In April, a press release on work done by the Pro-Bono committee was released and another on t Super Symposium event was released. In the first week of June, a story on financial professionals educating the public will be released. See below.

Financial Professionals Partner with Media and Educate Public

The current financial crisis should come as no surprise to anyone. After all, we live in a nation where public school curriculum includes little financial education and the disciplined saving of earlier generations has been replaced with consumer debt. There's no doubt some poor financial decisions result from ignorance.

Using media to increase their reach, financial professionals now are assuming the responsibility to educate the public on financial matters. Charlie Wolpoff sought to ease consumer fears based on financial misinformation. Three years ago, he and his co-host, Steven Aquino, started a weekly talk radio show, the Carroll County Buzz on

WTTR 1470 AM. Their goal? Educate, instead of panic. Answering listener questions, interviewing business people, and discussing local economic issues, the two CERTIFIED FINANCIAL PLANNER™ professionals are helping listeners make rational, educated decisions about their finances.

Americans for whom English is a secondary language have an even greater challenge finding quality, educational resources. Lee Kramer realized in 1985 that hearing impaired consumers were almost completely shut off from the primary medium for financial education: television and radio. Fluent in American Sign Language (ASL) and one of only two deaf CERTIFIED FINANCIAL PLANNER™ professionals, Kramer began working with the hearing impaired on a one-on-one basis. Today, Kramer uses internet, print and video phone to educate hearing impaired individuals.

CERTIFIED FINANCIAL PLANNER™ professional Tim Maurer believes so strongly that the current financial crisis hinges on a lack of financial education among consumers, that he is dramatically increasing educational opportunities for the public. Beginning with a Baltimore radio show on WCBM 680 AM, today Maurer regularly appears on CNBC Money and encourages consumers to use the media. “Calling in to a radio or TV program allows a certain amount of anonymity and flexibility that helps people to ask nagging financial questions. Many who call in to a program wouldn’t be inclined to take the time to set up an in-person meeting with a financial planner, so these outlets allow them to begin the education process without the time and financial commitments.”

Ultimately, the responsibility for financial education is with individuals. For consumers paralyzed into inaction or unsure of where to begin, the media can provide timely resources. Maurer said, “Radio and TV will never be able to replace the more in depth relationship and analysis that a personal financial planner offers, but it is a great starting point for consumers to become educated.”

Editor: Your readers might like to learn more about the financial professionals mentioned in this press release, and how they are helping consumers. Contact Joy Slabaugh at 443-735-0143 and we will arrange an interview.

Concerns/Issues:

Continue to need story ideas and press release ideas shared with me. The above story all happened based on an email a Chapter member forwarded me that they thought would interest me. From that, the above story was written and will be released. Please continue to shared topics you think may be able to be used in a release.

Upcoming Committee Meetings (time, date, venue):

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

Succession strategy:

Currently, no plan.

Financial Planning Association of Maryland
COMMITTEE REPORT

Committee Name **Program Committee**

Chair **Celie Neville and Pete Dixon**

Date **June 4, 2009**

Committee Member names:

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

New members (names) since last committee report:

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

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Updates:

Each program committee member is currently responsible for three of the twelve events throughout the Year. Specifically, the member assists the two assigned event chairs for the respective event months in advance. Initially, the committee member ensures that the date, location/venue, budgetary issues, partners, and next 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.

April's Networking Event, the lacrosse game at Towson University, was a great success, with high attendance and much networking.

The Super Symposium in May was also well attended and very informative.

The Practice Management Symposium, Technology in the 21st Century, will be held on June 11. The focu will be on three different proprietary software programs and 3 different technology platforms.

There are no events scheduled for July due to vacations.

August 15th is our night at Camden Yards.

Michael and Joe are making excellent progress for the CE program which has been moved to October
Mary Dunlap and George Jankiewicz are working on October's Financial Planning week.
The GR committee has November
Pam Gilmour is working on a digital photography class for December.

Concerns/Issues:

The major issue the committee must address is its role for 2010 in planning events, and the degree of autonomy they will have in structuring the schedule, and the guidance they desireand/or should receive from the board.

Upcoming Committee Meetings (time, date, venue):

The next Program Committee meeting is slated for June 17, 2009

Succession strategy:

Co-Chairs Celie Neville and Pete Dixon, for 2010

Financial Planning Association of Maryland
COMMITTEE REPORT

Committee Name **Partners Committee**

Chair **Mike Anders**

Date **6/5/09**

Committee Member names:
Rosemarie Cohen
John Danz
Tres Hughes
Mike Anders
Charlie Wolpoff
Mike Curley

New members (names) since last committee report:
n/a

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

Updates:
I took over the chair from Lori over the past couple of months. I will be starting from scratch as far as building a committee team. I will be reaching out to existing partners gauging interest in participation, and I hope to get together sometime in July.

Concerns/Issues:
Getting this started again will be a challenge in itself, adding committee members and having a meeting is the first step. Future challenge will be strategizing a plan to attract new/continued sponsorship.

Upcoming Committee Meetings (time, date, venue):
TBA

Succession strategy: