

We'll See You For Breakfast!

A lot has happened since we've last shared an update. Our quarterly meeting formats have changed to breakfasts and from the turn-out it appears as though you seem to prefer the AM timeslot. American College professor, Wade Pfau, spoke to a full room at the March meeting and Steve Forbes wrapped up another great Spring Symposium May 18, staying behind to sign his most recent publication.

In June we traveled near the border of Chester and Delaware Counties for the June meeting and welcomed some members residing further west in our geography who appreciated the shorter morning drive to breakfast. Kenn Tacchino from Widener University presented a robust program covering retirement plans, retirement advice, and the new fiduciary rules. Frankly he could have kept going if time would have permitted. Cas Thomas from ACE, a Chapter Gold Sponsor, shared issues of property liability exposure to our clients. Thanks to all who attended.

What's Next

Looking ahead to September 16th, we'll be welcoming veteran business journalist Bob Veres to the Keynote platform for our Fall Retreat. Andy Knott, a Pulitzer Prize nominee and Cook County prosecutor, is on the docket to present the two hour Ethics program, and as a new Fall Retreat offering to those not needing ethics CE, a two hour practice management program by Daniel Finley, founder and president of Advisors Solutions.

Keep November 18th on your calendar for the last breakfast meeting of the year and for insights from the MIT Agelab who have developed some interesting insights into the future of delivering planning advice.

How Can You Help

In the meantime, if you attend a professional workshop, see a speaker or hear of a presentation you feel would be valuable to our membership, feel free to share your ideas. The education committee is a great way to get involved in the FPA Chapter, just volunteer to help with a meeting, no long-term commitment and a meaningful way to give back to your industry.

Enjoy your summer and see you in the fall.