

Letter from the FPA Philly Tri-State President

I am surprised every year how quickly time moves. We just celebrated our Independence Day and are moving in on the halfway point of our summers. I hope everyone has some nice vacations planned.

We have had an exciting year so far. A few of our board members visited Washington DC last month to speak about the Fiduciary Rule and other important matters with our local representatives. National always does a fantastic job in organizing the event and getting us in front of the right people. We look forward to Advocacy Day 2017.

We felt that most of the speakers at the Spring Symposium were strong and offered us new, compelling information. Thank you to all that attended. Speaking of events, I made mention in my earlier letter about our intent to deliver relevant content in various ways. We have organized study groups in the Conshohocken and South Jersey areas, frequent happy hours throughout the area and meetings held in places besides hotels.

We are excited for what's on tap for the rest of the year. We have an action-packed summer planned for our members. We have 2 study group meetings planned, one in Conshohocken and the other in South Jersey. We also have a few social activities planned for the summer, including a couple of Happy Hours. Moving into the Fall season, we have the National BE conference in Baltimore in September quickly followed by our Fall Retreat on September 19th. We are heading back to Radnor Valley Country Club this year. Our last quarterly scheduled for November will be held at the Union League in Center City. That will be a can't miss event.

Speaking of meetings, after conversations with our members, one of the more consistent themes that I continue to hear is more CE. We continue to try to achieve a balance between CE presentations and non-CE topics (business development, practice management). One of your board members, Beth D'Andrea, has provided us a new way to view our programming calendar to deliver both types of presentations (CE approved and non CE) more effectively. In addition, as part of our website refresh, we want to be able to provide you a view of the entire programming calendar for the year so you can plan accordingly. As part of this initiative, we need your feedback though. So, continue to send us thoughts on meeting format, locations, and/or speakers that you would like to hear from in 2017.

Thank you for your membership and continued success to you in 2016!

Vincent R. Barbera, CFP®
FPA Phila Tri-State President