Membership

FPA Philadelphia Tri-State Area Members:

With 2015 in full swing, we are happy to report our membership is at a 5 year high of nearly 700 members. We will welcome the nearly 100 new members with our third annual New Member Breakfast to be held at ACE Club on April 17th from 7:30-9:00 AM. The complimentary event provides an excellent opportunity for all new members to meet the current board and past presidents while discussing ways to get the most out of your FPA Philadelphia Tri-State Area membership. Each board member will highlight their committee objectives and past presidents will share their experiences. We encourage all of our new members to attend. Following is a list of current FPA Philadelphia Tri-State Committees along with the committee chair's contact information. Please review each committee description and feel free to reach out with any questions or to become involved.

EDUCATION:
The committee is responsible for educational content of all our programs, including the Fall Retreat and Spring Symposium. You'll have opportunities to network with industry leaders, national experts and other members while shaping the education of our chapter. Where else will you have the opportunity to be familiar with the cutting edge issues of our industry and meet many of its leaders?
Contact: Pete Gutekunst at 267-513-1820 or peter.gutekunst@raymondjames.com

MEMBERSHIP:
We communicate and engage with existing members to increase participation in the chapter, recruit new members and follow up on member issues. The Committee makes phone calls to highlight specific events and gain feedback, holds new member orientation, organizes social events and promotes FPA Connect. It is a great committee to work on if you want to get to know our members.
Contact: Chris Bertram at 215 246 1162 or Chris.Bertram@marsh.com

PUBLIC AWARENESS AND SOCIAL MEDIA:
The Public awareness committee works directly with the public to promote the value of financial planning. Public awareness can take many forms, including exhibiting at public events, speaking to consumer groups, and creating alliances with other nonprofit organizations and companies to help educate their employees or members on the value of financial planning.
Contact: Sameer Somal at 202-276-7589 or ssomal@blueoceanglobalwealth.com

MARKETING AND MEDIA RELATIONS:
The committee focuses on facilitating relationships with local media by proving press releases, *Financial Planning Perspectives* articles, and answering media requests for comments on their articles. The committee also focuses on marketing chapter activities to its members and the public through various media outlets such as social media, email marketing and printed brochures.
Contact: Steve Krzywicki at 610-943-3117 or steven.j.krzywicki@ampf.com

SPONSOR DEVELOPMENT:
The sponsorship committee's objective is to develop relationships with those who provide products and services to the financial planning industry. Sponsorships help our chapter to deliver outstanding educational programs

and foster a relationship with our members. Our goal is to build a collaborative relationship between our members and sponsors.
Contact Nick Maningas at 610-202-7847 email nick.maningas@verizon.net .

PROFESSIONAL RELATIONS:
The committee establishes strategic relationships with local allied professional organizations such as the Estate Planning Council, CFP Board, and the CFA Society with the goal of promoting the value of partnering with the FPA and the financial planning profession.
Contact: Bill Love at 215-348-9393 or Blove4042@ymail.com

CAREER DEVELOPMENT:
The committee seeks to develop and provide programs, resources & opportunities for career advancement and success. We work with the local student chapters and NexGen committee to attract new planners to the profession and provide opportunities for mentoring. This is a great committee if you want to know the landscape of careers, get to know other members or mentor new planners.
Contact: Benjamin F. Cummings, Ph.D. at 610-660-2239 or bcummings@sju.edu

PRO BONO:
We organize and provide the experts to approved pro bono efforts throughout the Philadelphia area. Volunteering as an FPA pro bono volunteer is a great way for financial planners to give back to their communities. Pro bono can build bridges with other community organizations, attract new members, and increase public understanding and appreciation of financial planning.
Contact: Larry Helmick at 215-207-9430 or lhelmick@helmickcompany.com

ADVOCACY:
This committee connects with federal and state government officials to promote our profession and be a liaison between the FPA and our representatives. You will be the first to know of pending legislation, help us have a voice in consumer protection on financial issues, communicate important legislative and regulatory issues to chapter members and make amazing connections across our government.
Contact Nick Maningas at 610-202-7847 email nick.maningas@verizon.net ; or Kevin Coughlin at 267-355-4740 email kevin.coughlin@tdameritrade.com

NEXGEN:
NexGen is intended to be a community of the next generation of financial planners. Next Gen strives to provide members with a network that serves to support, advise and encourage one another in our professional advancement; promote, foster and direct programs that aid in knowledge transference; and explore issues common to younger planners and seek means of accentuating the positives and finding resolutions for the negatives.
Contact: Rachel Fieweger at 215-557-3800 or Rachel@rtdfinancial.com

If you have an interest in getting involved with, or learning more about, one of the committees please reach out to the committee contact shown above. We look forward to another exciting year of engaging and adding value to our membership!

Christopher R. Bertram, CISR
FPA Philadelphia Tri-State Area Membership Director
215-246-1162
chris.bertram@marsh.com