



OF
THE *PHILADELPHIA*
TRI-STATE AREA

The primary aim of the Financial Planning Association is to be the community that fosters the value of financial planning and advances the financial planning profession.

Message from our Chapter President

2015 is shaping up to be another great year for our FPA Philadelphia Tri-State Chapter! Our main goal this year is to get you more involved in the chapter. What's the best way to get involved? Join a committee! The more you give to the chapter, the more you'll get out of your membership.

We need your support and involvement in order to educate the public about financial planning, give back to our community, advocate lawmakers on behalf of our profession, provide learning opportunities, and help develop the next generation of planners.

We have great committees: Membership, NexGen, Marketing, Social Media, Education/Programing, Sponsorship, Pro Bono, Government Relations, Professional Alliances, and Career Development. Visit our website for each committee chair's contact information (www.fpaphilly.org) and check out the Committee Chair's reports within this newsletter to find an area that excites you. Which committees are you interested in working with?

Getting involved in our chapter was instrumental to my career. After serving on the education committee, I learned about a career opportunity that was posted to our chapter's job board. That was 8 years ago, and I've been at my current company ever since. In addition, I have developed many meaningful relationships while serving on committees and the local board.

In addition to our committees, there is also the opportunity to help plan chapter happy hours and organize regional study groups. This year, we're seeking to strengthen our relationship with our Sponsors who are integral to our chapter's success. Without them we would not exist. This year we rolled out a new sponsor package. The goal is to provide more value to our sponsors as they are the engine that keeps our chapter running. I encourage you to reach out and establish relationships with our sponsors. Our 2015 Platinum sponsor is The Philadelphia Foundation (Tom Mesko). Our 2015 Gold sponsors are Clark Capital (Ryan Kenney), Ace Private Risk Services (Barry Yoder), Franklin Square (Stephanie Brown), and Schroders (Chris Alexander). Contact information can be found at www.fpaphilly.org.

The incredible dedication of the board members and committee members goes far beyond most volunteer organizations. It is through huge amounts of selfless effort and dedication that we continue as one of the premier chapters of the Financial Planning Association. The amount of time that our members spend advancing the cause of financial planning through pro bono efforts is truly heartwarming. I start this year as president with a great appreciation for both the organizational structure that we have in place, and the commitment of a dedicated team. I feel very fortunate to have the support of a strong and committed group of board members and volunteers and am honored to serve as the 2015 Chapter President.

Looking forward to a great 2015!