

Get Inspired Get Involved Join a Committee!



We would love for you to join one of our committees on a continuous basis, but we recognize that it is sometimes a challenge to commit your time. This year, we have created smaller, time limited opportunities for you so that you may get involved in making our chapter the best it can be and advancing the profession of financial planning. These opportunities are usually small projects with a defined end and do not require an on-going commitment. This is a great way for you to make a difference in your profession and network with other members. You can truly Do One Thing!

Please check the thing(s) next to your ONE Thing! and turn it in at the Registration Desk today, with your NAME: _____ and EMAIL: _____

Social Charity Golf Event: Have fun, while you network with your fellow professionals and raise money for the Foundation for Financial Planning and other Pro Bono chapter work.

- Join the Golf Committee and help plan the May event – 1 Kick off Meeting, 3 Conf. Calls – about 3 Hrs.
- Seek Sponsors to support this charity event – Call 2-3 Sponsors – about 30 Minutes
- Come and enjoy a great day on the course – Hours of networking and fun!

Pro Bono: The FPA Pro Bono Program targets underserved individuals and families striving to build assets and improve their lives but who cannot afford to engage a planner on their own. Flexible Timing!

- Volunteer to teach a financial literacy workshop
- Be a mentor, teaching budgeting and other basic financial skills
- Work with a local school system on financial literacy program
- Lead a basic investment workshop
- Help plan and participate in Financial Planning Week
- Work with the military on financial planning needs

Public Relations: Enhance your visibility and be seen as a financial planning resource.

- Develop a relationship with your local newspaper editor

Advocacy: Help shape legislation and the future of the profession.

- Help Organize an Advocacy Day at the state level
- Interact with your legislator
- Attend a hearing on advisor regulatory issues
- Attend the FPA National Advocacy Day in June

Member Communications: Sharpen your communication skills; engage members in events.

- Contribute an article to our newsletter
- Develop an announcement for one chapter program and/or event
- Develop new ideas for our chapter web site
- Help with our LinkedIn, Twitter and Facebook Posts on individual events

Programs and NexGen - Professional Development: Reach out to students, encourage new financial planning professionals, and assist senior advisors in keeping their skills sharp.

- Be the FPA NCA liaison to a local educational institution
- Be the liaison to a speaker (symposium/luncheon/Happy Hour) to obtain needed CE/presentation materials
- Help coordinate a study group for students, beginners or experienced professionals
- Assist in the planning of a Professional Development Program for our chapter
- Be a mentor and engage with a new planner for three months

Programming and/or Symposium: Infinite Possibilities: Integrating our Life and Profession with Education and Inspiration. Reach out to students, encourage new financial planning professionals, and assist senior advisors in keeping their skills sharp.

- Suggest topics and speakers for educational programs
- Help build the Spring Symposium with our sponsor partners
- Review and critique a potential speaker's presentation in your area of expertise
- Contact a speaker for their bio, outline, handouts and photo for one meeting
- Attend our educational programs on a regular basis
- Be a Buddy at one meeting to foster community building
- Invite a guest to a meeting to explore FPA

Sponsorships: Create alliances with partners.

- Draft a survey to evaluate partner satisfaction
- Meet with partners in your office
- Call a sponsor and make them aware of their member benefits

Allied Professionals: Encourage networking and joint participation in allied professional events.

- Develop a relationship with local allied professionals; develop, sponsor and attend joint events; Seek common lobbying events; encourage membership in FPA NCA
- Create cross organization speaking opportunities

Membership: Increase Chapter membership.

- Make telephone calls to welcome new members one month a year
- Make telephone calls to encourage members to renew one month a year
- Help staff a CFP Exam luncheon for students
- Visit a CFP class to make students aware of FPA NCA
- Survey Members to assess their satisfaction with our chapter
- Be a greeter and welcome members at a meeting

Add another ONE Thing!

