Engage with FPA Philadelphia!

2018 Committee Descriptions

Committees and committee volunteers are very important to the long-term health and viability of our organization and a great place to develop skills and connections that will further your career. Below is a list of current FPA Philadelphia Tri-State Committees:

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: Jim McGowan at 215-348-9393 or JMcGowan@marshallfinancial.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: Tom Mesko at 215-563-6417 or TMesko@philafound.org

MARKETING/MEDIA RELATIONS/SOCIAL MEDIA:

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: Daniel Zajac at 610-363-1344 or Daniel@simonezajac.com

FPA FINANCIAL PLANNING ASSOCIATION

OF THE PHILADELPHIA TRI-STATE AREA

Phone: 215-295-0729
E-mail: ccstewart@comcast.net

Mailing:
FPA Philadelphia Tri-State Area Chapter
P.O. Box 3
Fairless Hills, PA 19030

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SPONSORSHIP/HAPPY HOURS:
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: David Emery at 215-348-9393 or Demery@marshallfinancial.com

PROFESSIONAL ALLIANCES:
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: Jordan Rosenblatt at 856-216-0211 or JordanR@emabrokerage.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 Nextgen 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: Brent Zackon at 215-557-3800 or Brent@RTDFinancial.com

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: Bryan Dalesandro at 610-994-9194 or Bryan.Dalesandro@concentuswealth.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: Sameer Somal at 202-276-7589 or **Sameer.Somal@gmail.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: Brent Zackon at 215-557-3800 or Brent@RTDFinancial.com