PRESIDENT’S MESSAGE
LINDA WEINRIB, CFP®
President

It’s been 15 years since FPA was born. There have been many changes over the years as we grow up to be the association for CFPs. Over the past two years, the Illinois Chapter introduced two more changes: the Conference for Advanced Planning (“CAP”) and the new Chapter Meeting Venue.

This year’s CAP brought together some of the brightest minds in financial planning with programs geared toward professionals looking for advanced core planning topics, as well as business planning issues and ideas. The goals of the conference were to bring nationally recognized speakers to you and to provide attendees with ideas that could be implemented immediately. Many attendees came up to me to personally say how great the speakers were, that this year was better than last, and that with so many excellent advanced level breakout sessions, it was hard to choose! Many thanks to our speakers and partners who made CAP special!

We reviewed Chapter program surveys to find topics that were of interest to you personally and professionally. This year’s lineup included a review of hot investment topics such as Christine Pishko from Nuveen/TIAA on Socially Responsible Investing and Jeff Carter from Hyde Park Angels discussing direct Angel and Venture Capital investment opportunities in the Chicago, Illinois area. We were thrilled to welcomed back popular speakers such as Bob Keebler, Michael Kitces, and Jon Guyton. New to the venue was David Blanchett from one of FPA of Illinois’ long term partners, Morningstar, who spoke on retirement planning issues.

Annuities have been under-represented in previous conferences so we included topics by Michael Kitces and Lincoln Financial for those of us that are less experienced with insurance related products but have clients that are interested or have purchased them.

A big concern expressed by all of us in financial services is the aging of our client base. John Nersesian from Nuveen discussed how to help build inter-family relationships by helping parents nurture responsibility in youth, young adults, and adult children.

FPA wants to help you build your business through education and marketing ideas. Ben Lewis from FPA provided programs on Building Your Brand and Proactive Media Outreach. He also provided a session on FPA Media Training that is required to get on the FPA media list.

We are excited to announce that the most highly rated speakers agreed to a return performance: Robert Keebler, Michael Kitces, John Guyton, and David Blanchett. Watch for more news on CAP 2016!

The theme of this years Chapter series has been “Practice Reboot: Creating Your Ideal Financial Planning Firm” and has included engaging speakers as well as post-meeting study groups to facilitate opportunities to network and brainstorm. It also has been an opportunity for our NexGen members to mix and mingle with more seasoned professionals.

Financial Planning Day took place on October 24 at the Harold Washington Library. It’s rewarding to provide coaching and financial planning services to the underserved in our community. Whether they are elderly, young or disadvantaged, their appreciation is genuine and deep. Join the drive for financial literacy with your time or money, focusing on ways to help those that need it the most. Contact Randy Bruns for volunteer opportunities or Dee Farris for information on gifting.

Promote the importance of the CFP! We know how important planning is to creating a viable retirement and future for families. Small things—an emailed idea or volunteering for one hour a year—could have a huge impact. Be active!
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CHAPTER EXECUTIVE
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de.farris@fpaillinois.org

COUNCIL EXECUTIVE –
NORTH SHORE AND OAK
BROOK
Kelly Zupan
(312) 318-6412
kzupan@fpailinois.org

Mission Statement
Inclusion: We will serve a broad, diverse membership

Member Development: Enhance the professional
Development of our members through networking,
education, and service opportunities

Vision Statement
To be the community that fosters the value of financial
planning services.

To be the primary resource of support and information
for our members, the public and the media.

Values
We demonstrate leadership by:

• Listening to each other and being fair and impartial;
• Involving communities and respecting their input and opinions;
• Treating each other with dignity and respect;
• Broadening our cultural and social horizons beyond
our usual experiences;
• Treating others with compassion and responsibility;
• Fostering teamwork within and outside the Association;
• Taking responsibility and accountability for our actions;
• Producing timely and reliable data and information;
• Encouraging innovation and recognizing contributions;
• Creating a work environment that encourages input
and feedback;
• Embracing the idea of continual learning and training.

FPA OF ILLINOIS MISSION STATEMENT

LOGIN, CHECK OUT AND
SEE WHAT’S NEW AT THE
ALL-NEW MYFPA

The newly-designed FPA member-only website now
features the latest FPA news, research, benefits,
educational opportunities and trending member-to-
member discussions. The new landing page makes
it easier to find relevant, up-to-date content. And the
page is updated every week, so check back often!

Login anytime to see what’s happening in
YOUR association and see how MyFPA is your
One Connection™ to all things FPA!

FPA PROFESSIONAL
DEVELOPMENT CENTER IS
NOW OPEN AND AVAILABLE!

Honing your skills as knowledgeable, competent
financial planners is paramount today in a world
where the profession is evolving rapidly. To help, FPA
has recently launched the Professional Development
Center at OneFPA.org that makes it possible for you
to learn in your way. The center integrates everything
related to learning and professional development at
FPA. Start learning YOUR way today!
CHAIRMAN’S MESSAGE

CRAIG LARSEN, CFP®
CHAIRMAN

As the year draws to a close and my term on the FPA of Illinois board draws to an end, I thought it a good time to reflect upon our chapter, and my experience as a board member. One thing I came to fully appreciate was the sheer number of educational and networking events that we offer our members throughout the year. As a member of the FPA of Illinois you had about 40 opportunities throughout 2015 to grow professionally, and to get to know your peers. To my knowledge this is far and away the most of any FPA chapter nationwide. However, it isn’t just the number of events that you can choose from, but also the quality of the programming. All of the regional councils offer varied and quality programming. Over the past several years we also raised the bar for our Chapter-wide programming. The second annual Conference for Advanced Planning (CAP) was another rousing success, offering two days of education that rivals many national conferences. This year we also added depth to the Spring Financial Forum, building in multiple tracks to offer more opportunities for you to select the education content that is a best fit for you. Another new addition is the “Reboot Your Practice” series which features nationally recognized speakers who do a deep dive on topics that will help you with your practice.

All of this would not be possible without countless volunteer hours from our members. Many of your fellow financial planners have worked hard to deliver valuable education to you. Having played a small part in helping with our conferences I can tell you it is absolutely true that when you volunteer you get back far more than you give. The professional relationships that I have forged through my volunteer opportunities have been important to my professional growth. However, as often happens, I am also blessed to have built meaningful personal relationships as well.

With that, I must confess that one of the goals I had for my tenure in chapter leadership has yet to be fully realized. Although Illinois is home to the largest FPA chapter in the country, we have had trouble fully staffing our committees with the number of volunteers that we need. Oftentimes some very dedicated volunteers have to carry a heavier load over and over due to a lack of volunteers. As one of my closing efforts before I transition off the FPA of Illinois Board, I encourage you to consider taking advantage of the opportunity to volunteer for for one of our committees. You can offer as little or as much time as you have available. So when you see volunteer opportunities publicized, do yourself a favor and volunteer. I’m confident you will find it as rewarding as I did.

Finally, when it comes to the work of the chapter over the years, there is one person who has been instrumental in making sure that everything gets done, and done well. We are fortunate to have Dee Farris as our Chapter Executive. Dee works tirelessly for you, and for the entire FPA of Illinois. She does this with a cheerful attitude, and a smile on her face. So I hope you will join me in thanking Dee the next time you see her at an FPA event.
LOOKING FORWARD TO 2016
JORIE PIT, CFP®
President-Elect

I joined the Financial Planning Association of Illinois in 2008. It was the first thing I did after receiving the long awaited letter letting me know I had passed the CFP® examination. I realized at that time that while I now had the professional credential I had been working so hard towards, I did not have a network of professional colleagues that I could turn to for support. Now, almost 8 years later, I can unequivocally say that joining the FPA of IL was the best career decision I have made. Through the FPA I found my current position at AHC Advisors, and also made many friends and benefited immensely from the wide array of educational opportunities offered.

I am honored and excited to have the opportunity to lead this great organization as President in 2016. I have served on the board for the past three years in the roles of Director of Public Awareness, Director of Finance and most recently as President Elect. I have witnessed the progress made in recent years under previous boards and I am eager to continue and add to our past successes.

FPA of IL has been busy in 2015! I want to bring your attention to some of the highlights as these are areas that we plan to continue to grow in 2016.

In 2015 we gave a face lift to the Distinguished Speaker series that had been held at Café LaCave. The chapter meetings have now been moved downtown and are being held at 222 South Riverside Plaza which is very convenient to both Union Station and Ogilvie Station. The meetings were well received and well attended and we will continue the chapter meetings in this same location in 2016. We hope to see you there!

The transition of the chapter meetings from the O’Hare area to the city made us recognize the potential need for the formation of a new council for members in that area. Past president, Tom Howard, stepped up this year to begin exploring potential need for the formation of a new council. Now, almost 8 years later, I can unequivocally say that joining the FPA of IL was the best career decision I have made.

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The transition of the chapter meetings from the O’Hare area to the city made us recognize the potential need for the formation of a new council for members in that area. Past president, Tom Howard, stepped up this year to begin exploring interest in the formation of a Northwest Council. If you are interested in getting involved in with the Northwest Council or volunteering to help move this initiative forward please reach out to Dee Farris or a member of the board to find out how to get involved.

Our pro-bono and public awareness events have continued to flourish. These events offer free financial planning advice to the public. We have three major events each year. Two of these events happen in conjunction with MoneySmart Week which is an initiative led by the Federal Reserve Bank of Chicago. First is our own event that we host each year at the Harold Washington Library. The second event, a more recent addition to our pro-bono line-up, is Age Well DuPage. For both of these events we bring in a keynote speaker to talk about financial planning topics. Afterwards, our members are available to sit down one-on-one with participants to discuss their personal financial planning questions. We offer a similar event in October called Financial Planning Day. This event features a series of financial planning workshops presented by our own members along with one-on-one discussions with individual participants. All of these events are very well received by the public and by our membership. These events will be continued next year and we hope you will get involved in the worthwhile cause of providing financial planning advice to the underserved.

This year the FPA of Illinois organized an Advocacy Day in Springfield. There is a lot of regulation in our industry and much discussion recently about what that regulation should look like going forward. Our members spent the day in Springfield meeting with lawmakers and offering not only our opinions but our willingness to be a resource for lawmakers as they work to understand the intricacies of our industry. We plan to make Advocacy Day an annual event and we hope that you will join us in 2016!

Encouraging young people to consider a career in financial planning has been a goal of FPA of IL for many years now. As an industry it is very important that we encourage and support the next generation of financial planners. Members of FPA of IL who are under the age of 37 are encouraged to participate in our NexGen group. NexGen was formed to create a group where young planners could get together to discuss the unique challenges and opportunities that they face. The success of our NexGen group has inspired us to begin forming closer relationships with many of the colleges and universities in our state that offer financial planning degree programs. This is an area of growth for our organization and we would welcome the help of individuals who would like to volunteer and help move this initiative forward. One of the ideas that has been floated is to organize a career day in order to bring together prospective employers with potential interns and employees.

The (not so) subtle message I am looking to get across is to get involved! This is a volunteer organization and we need your ideas and your time to make this organization the best that it can be. I can tell you from experience that getting involved will ultimately make your membership in our organization much more rewarding. I’m looking forward to a great 2016 and to seeing all of you at our upcoming meetings and events!
# Calendar of Upcoming Events

## 2015

<table>
<thead>
<tr>
<th>Day and Time</th>
<th>Council</th>
<th>Description</th>
<th>Speaker</th>
<th>Location</th>
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<td><strong>November</strong></td>
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<tr>
<td>W 18</td>
<td>North Shore</td>
<td>Tax Advantaged Investment Planning Export to our Calendar</td>
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<td>Highland Park Country Club</td>
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<td>W 18</td>
<td>Northwest</td>
<td>Journal Discussion on the value of Social Security deferral beyond age 62</td>
<td>David A. Noyes, office, Elgin, IL</td>
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<td><strong>December</strong></td>
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<td>T 8</td>
<td>South Suburban</td>
<td>TBD</td>
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<td>Tinley Park Convention Center, Tinley Park, IL</td>
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## 2016

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<th>Council</th>
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<td><strong>February</strong></td>
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<td>T 9</td>
<td>Chapter</td>
<td>Coaching for your Ideal Future</td>
<td>Tracy Beckes</td>
<td>222 South Riverside Plaza, Suite 1900, Chicago</td>
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<tr>
<td>W 17</td>
<td>North Shore</td>
<td>Real Estate Planning: Housing Options for All Stages of Life</td>
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<td>Highland Park Country Club</td>
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<td><strong>April</strong></td>
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<td>W 20</td>
<td>North Shore</td>
<td>Technology Trends for the Financial Planner</td>
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<td>Highland Park Country Club</td>
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<td><strong>May</strong></td>
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<td>TH 12</td>
<td>Chapter</td>
<td>Spring Forum</td>
<td>Various</td>
<td>UBS Conference Center</td>
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REPORT FROM

CHICAGO LOOP COUNCIL

JENNIFER GOULD, CFP®, CRPC®

The Chicago Loop Council has had a great programming year. As this newsletter goes to press, we are looking forward to our annual Economic Update with the Fed on November 13. Bill Strauss, senior economist and economic advisor in the economic research department at the Federal Reserve Bank of Chicago, has never disappointed. Bill ties economic data and research up in a pretty bow in time for the holidays!

It was a busy summer for our membership. We started with a great presentation in July from Andrew Salata of the social security administration. Mr. Salata’s passion is evident when discussing how we can make sure our clients get the most return from their contributions. Navigating this labyrinth for our senior clients is a great plus for your business and being able to guide them to a resource like Andrew is another bonus.

The annual CAP Conference was attended by many of our Chicago Loop family. The conference was great this year and provided a great learning environment on advanced topics in financial planning, of which all of us could benefit. The various tracks in the program allowed participants to keep on one track, or hop from topic to topic, service area to service area. Did you see a topic at CAP that you would like the council to expand on? Were you hoping for a topic that was not on the agenda?

Let us know! Whether at CAP or through the Loop Council, we are here to bring programming that you want to the forefront!

In closing, we on the Loop Council Board wish all of those reading this newsletter Happy Holidays and cheers to an educational and prosperous 2016!

REPORT FROM

NORTH SHORE COUNCIL

MONTE LUZADDER, CFA, CFP®, CRC
DIRECTOR OF COMMUNICATIONS,
NORTH SHORE COUNCIL

On September 30 the North Shore Council hosted a breakfast meeting on the topic of Employer/Employee Benefit Planning Practices. Our guest speaker was Holly Danziger, a Partner at Karel-Gordon & Associates, a pension consulting and administration firm based in Northbrook. The primary sponsor for the event was ProShares ETF's represented by Matt Schref.

Ms. Danziger’s presentation was titled “Tax Planning Strategies for Small Business Owners using Qualified Retirement Plans in 2015.” She reviewed the range of qualified plans available to employers ranging from basic SEP IRA’s up through complex defined benefit plans and delineated the potential benefits of each from the perspective of both the employer and employee. The presentation also described the ancillary roles that a number of professional firms may play in the servicing and administration of a qualified plan, e.g., Pension Consultant, Accountant, Financial Advisor, Recordkeeper and Custodian. Ms. Danziger walked through a number of examples of qualified plans with different structures to illustrate the potential benefits to both employers and employees in different scenarios. It was also noted that some IRS regulations released in 2010 helped bring clarity to Cash Balance Plans and increasing their appeal among smaller companies. This has led to a resurgence of Cash Balance Plans among smaller employers which increases the likelihood that financial planners will encounter clients who require advice in this area of the qualified plan space.

To thank Ms. Danziger for providing the educational content at this meeting the North Shore Council has made a monetary gift in her name to the charity of her choice, the Laurie S. Bauer Foundation for Sudden Loss. The next meeting of the North Shore Council will be a luncheon meeting on Wednesday, November 18 from 10:30 a.m. – 1:30 p.m at the Highland Park Country Club. The headline topic will be “Tax-Advantaged Investment Planning” and our lead presenter will be John Nersesian, CFP®, CIMA from Nuveen Investments Wealth Management Services.
REPORT FROM
NORTHWEST COUNCIL

TOM L. HOWARD, CFP®
PRESIDENT, NORTHWEST COUNCIL

We are off to a great start with programming in the Rockford area with 20 advisor/planners in attendance for a presentation on Charitable Trusts and a networking event.

As this newsletter goes to press, we’re looking forward to our November 12 event where Peggy Tracy will speak on Divorce Financial Planning at Giovanni’s in Rockford.

Things are not so rosy further east. Our event on October 14 was cancelled due to lack of registration. Another event will be planned for the winter but your input regarding topics and location are needed.

We still are planning on a November luncheon and discussion of social security strategies using the April, 2015 Journal article. More information on the events section of the website. Hope to see you there and to hear of your interest for more local programming and networking.

REPORT FROM
OAK BROOK COUNCIL

LORI J. MILLER, CFP® M.S.
PRESIDENT, OAK BROOK COUNCIL

Happy Fall FPA readers! We just held our final quarterly breakfast gathering at our lovely Naperville Country Club location, and our attendees left with the latest news on Monetary and Fiscal Policies straight from the Chicago Federal Reserve and an industry leader, JPMorgan, respectively. As expected, the Federal Reserve is maintaining its policy of not moving rates, citing that inflation is contained as we’re growing slowly but steadily. However, the Fed dialed back 2016 and beyond estimates for GDP and Unemployment, as returning senior business economist Scott Brave presented and interpreted Monetary policy data which hints that soon we may be getting off zero rates. It was a treat to hear Gregg Band, an Executive Director of JPMorgan interpret this Monetary news for Fiscal policy, especially with the upcoming Presidential Election, continued market volatility, and concerned investors. Our product partners, John Sullivan and Valerie Staublin from Lincoln Financial provided an insight into an industry tool with their patented iForLife living benefit rider and a selection of subadvisors in their retirement vehicles. Talking in real time about complex events in a simple way to our clients was a big take-away from this content-rich program, and did I mention we enjoyed a delicious hot breakfast?

Behavioral Finance was a hit at our late August gathering with the “family love letter” and helping to understand the values and core-belief differences and communication styles among the Traditionalists, Baby Boomers, Millennials, Generation X, Y, and Z generations. Our clinical social worker/therapist presenter Brian Flynn used a coaching style to deliver his message for more effective communications, and Cheri Brooks from Neuberger Berman provided a toolkit for intergenerational wealth planning.

NEXGEN UPDATE

DUSTIN OBHAS, CFP®, AIF®
CHAIR, NEXGEN

This year at NexGen, we’ve hosted Gary Mitchiner, a growth coach based out in Grayslake, for the last two events. Gary has been such a hit that he’s coming back for another session this year (Thursday, November 19 from 5:00 – 6:30 PM) and we couldn’t be happier.

A little about Gary, his firm—The Growth Leaders, LLC, have invested a combined 70 years in studying the breakthrough skills of the top 1% of performers in business development and growth. Gary specializes in helping Wealth Advisors—especially those who hate the “s” word—selling—and prefer being of service to others.

In this upcoming session, Gary will build on the first two sessions by introducing more advanced listening skills that advisors can use to build trust and earn new business more quickly with clients and prospects.

It’s no surprise Gary has been a hit with attendees. We’ve had high attendance at each of Gary’s sessions, and I would anticipate another favorable turnout for this upcoming session.

We hope to see you there.

>> UPCOMING NEXGEN EVENT

ACQUIRING TOP 1% PERFORMANCE SKILLS
Thursday, November 19 | 5:00 – 6:30 PM
Deutsche Asset Management office
222 S. Riverside Plaza St., 2600, Chicago, IL 60606
CAP 2015 was another resounding success. The line-up blended a perfect mix of speakers, topics and information in a power-packed two-day multi-track event. We brought together some of the sharpest minds in the industry to help you achieve a higher level of expertise and provide you with actionable ideas to share with your clients and advance your business.

"Excellent speaker! Passionate, informed and inspiring. Presented good info in an energetic format that kept your attention. Always Excellent! A major reason to attend! Top-notch speaker!!"

WHAT WAS SAID ABOUT JONATHAN GUYTON:

"Excellent manner of presentation. Great stuff to present. Logical, smart and easy to use as presented. Outstanding—best presentation I’ve attended on this topic. Jonathan was great—materials/slides excellent!!"

WHAT WAS SAID ABOUT MICHAEL KITCES:

"Excellent speaker! Passionate, informed and inspiring. Presented good info in an energetic format that kept your attention. Always Excellent! A major reason to attend! Top-notch speaker!!"

Speakers knowledgeable on newest tools available to advisors (longevity annuities, private equity available to greater audience) So helpful! Health insurance great too!

Very impressed. Quality at every level. Thank you! • Excellent conference overall. • Continue to get top quality speakers/presenters and wide range of topics.
WHAT WAS SAID ABOUT ROBERT KEEBLER:

“Very well done. Great topic for lunch presentation. Mr. Keebler is an outstanding presenter. Please invite him again. Excellent presentation!”

WHAT WAS SAID ABOUT DAVID BLANCHETT:

“Awesome! Bring him back. Great research shed light on old concepts/assumptions and that retirement planning is quite different/Excellent!”

Most of the sessions last year met the criteria for “advanced planners conference.” This year, I felt that virtually all of the sessions I attended met that standard. Great job on assembling the content and presenters for the conference.
MEMBERS ANNIVERSARIES

Congratulations to members celebrating membership anniversaries

June 16 – October 15, 2015

25 YEARS
Lawrence J. Brottman, CFP®, CPA
Dennis A. Fulkerson, Sr., CFP®, CPA, ChFC
Ellen S. Rogin, CFP®, CPA

20 YEARS
Patricia A. Fosmoe, CFP®
Richard H. Kolb, Jr., JD, CPA, CFP®

15 YEARS
Paul G. Alberts, CFP®
Tracy S. Beard, CFP®
Julie L. Bossent, CFP®
Yonhee C. Gordon, CFP®
David J. Huber, CFP®
Jeffrey J. Huizenga, CFP®
William G. Hurckes
Nobert M. Mindel, CFP®
Jason Provost, CFP®
Timothy J. Quinn, CFP®, CPA
Margaret Quinn, CFP®
Sue M. Smith, CFP®
Edward R. Vrablik
Myong Ho Yang, CFP®

10 YEARS
Kathleen M. Bacon
Jeffrey W. Bruce
Julie A. Hupp
James B. King
Dwayne E. Konicek
James B. King
Julie A. Hupp
Kathleen M. Bacon

5 YEARS
Nancy T. Bell, CFP®
James P. Brewer
C R Brown
Katherine M. Buehler
Philip D. Hogg, CFP®
Barbara Kay, MA, LPC, RCC
Lynn Lavender, CFP®
Katherine J. Morris, CFP®
Mary M. Murphy, CFP®
Stephen A. Newbold, J.D., CFP®
Tom Olofsson, Esq.
Rebecca Raff, CFP®
Mary Lynn Ubik, CFP®
David Wilson, CFP®, CPA

CHICAGO FINANCIAL PLANNING DAY 2015
RANDALL BRUNS, CFP®
DIRECTOR OF PUBLIC AWARENESS

On Saturday, October 24, FPA of Illinois and the Harold Washington Library hosted its sixth annual “Chicago Financial Planning Day.” This local event was part of the national “Financial Planning Days” initiative sponsored by four national non-profit organizations—the Financial Planning Association®, the Certified Financial Planner Board of Standards, Inc.®, the Foundation for Financial Planning, and the United States Conference of Mayors.

Author and financial planner, Judy McNiff, delivered the keynote address. McNiff conducts creative audience presentations that combine investment concepts with everyday situations to help take the mystery out of managing your money. Her presentation, titled “How to Tame the Money Monster,” explained how to teach your children responsibility with their money so they don’t spend all of yours.

Chicago Financial Planning Day also featured six different presentations covering basic financial planning topics, including retirement planning, investing basics, Social Security, and estate planning. Meanwhile, more than 25 CERTIFIED FINANCIAL PLANNER™ professionals provided complimentary one-on-one financial planning consultations throughout the morning and afternoon.

As usual, Chicago Financial Planning Day was a big success. Over 150 attendees took part in the event, many of whom were returning patrons from prior years. We thank all of the volunteer CFP® professionals for making it possible, and we look forward to seeing you again next year!
CHAPTER EVENTS

TIME FOR A PRACTICE REBOOT?

STEVE O’HARA, CFP®
CO-DIRECTOR OF PROGRAMS

The Practice Reboot 2015 Series has been an effort to breathe new life and ideas into your current approach to doing business. On November 2, we held our final installment for 2015, with Alan Moore. An acclaimed presenter, and financial planning practitioner, he presented ideas on how our practices will be transformed over the upcoming years; what tech tools exist, and how to best engage our younger, emerging clientele as they grow an awareness of their financial planning objectives and needs.

In a word, WOW. Alan Moore, 28 years old, showed up in jeans, a t-shirt and hiking boots, and the greatest Jeremiah Johnson beard I have ever seen on someone I was speaking to. And felled the room. One of the founders of XY Planning Network, (along with Michael Kitces), he spoke on three different topics. Of greater interest to me was the trend of emerging Gen X and Gen Y clients, their level of under-service, and an alternative service method that is profitable, and allows these 20-something’s though 40-something’s to get relevant, on-point service without feeling like they are begging or taking charity.

Our March offering was designed to provide Breakthrough Business Development Strategies, and was met with a great level of enthusiasm. Clearly we have provided selling strategies before, but the presentation by Gary Mitchiner was unique, and walked an effective line between attitudes that say “I am a professional and not a salesman” and “I want to serve more clients because what I do matters.” Financial Advisors, and our sponsors alike were impressed with the content and practices presented.

In May, Jonathan Guyton presented his latest thinking in Sustainable Retirement Distribution planning and experiences, and lead to a lively discussion and engagement by those in attendance. This presenter and topic have been highlighted in similar vanes here at FPA of Illinois in the past, but if you don’t already practice these strategies, his combination of real client feedback and back testing, in the face of other advisors misgivings, provide real stress testing for the ideas, and how you may present them within your practice.

In September, our own John Wheeler, a longtime FPA of Illinois pioneer and board member, and forty year insurance professional presented “What every CFP Professional ught to know about insurance.” Even for the programming chairs, who have about 50 years of insurance experience within financial plans, this was chock full of practical ideas on how to use insurance as a tool for risk management, how to unlock some of the hidden client misconceptions, and how to successfully address our clients’ needs.

The final wrap-up, 25 technologies for under $25, (mostly free) was one more wow item. The next chance you get to see this guy...do yourself a huge favor, and do it.

We have also identified our schedule, and syllabus for the 2016 Series. Our kickoff will be Tuesday, February 9, with a day long program, tentatively 9 am to 3 pm. Tracy Beckes, a nationally prominent coach to financial advisors, will be presenting on Building Your Ideal Future, and in this full day session you are encouraged to bring your entire staff for the day. As someone who has followed Tracy for the past 13 years, I am confident that she has the ability to change your year, and future, for the better. Plan to stay after for a networking session as well, at the South Branch Restaurant and Grill to share your feedback with other attendees and meet our staff and sponsors.

On Thursday June 2, at 8:30 am, we will present Retirement Planning for Business Owners. Understanding the requirements of company retirement plans, what the opportunity means to your practice, and the life-cycle of these plans within a growing, successfully maturing business, is what you can expect as a result of your participation.

Tuesday September 20 is the day we will present Marketing for the Financial Advisory Firm. Looking at changes from the past decade, and building a marketing plan for you personally or your company, is the goal of this session.

We will wrap up on Thursday December 1 with an in-depth look at Mergers, Acquisitions and Succession Planning. Whether you are building an initial practice, looking to acquire practices or individual planners, or developing a successful exit plan, we anticipate this session will be valuable to you. Even if these are not on your immediate radar screen, understanding the issues and opportunities here represents valuable knowledge for protecting your clients and growing your business.

We welcome your comments about past events, and your suggestions for upcoming ones.

Sincerely,

Brad Rosley, Steve O’Hara
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