FPA
FINANCIAL PLANNING ASSOCIATION



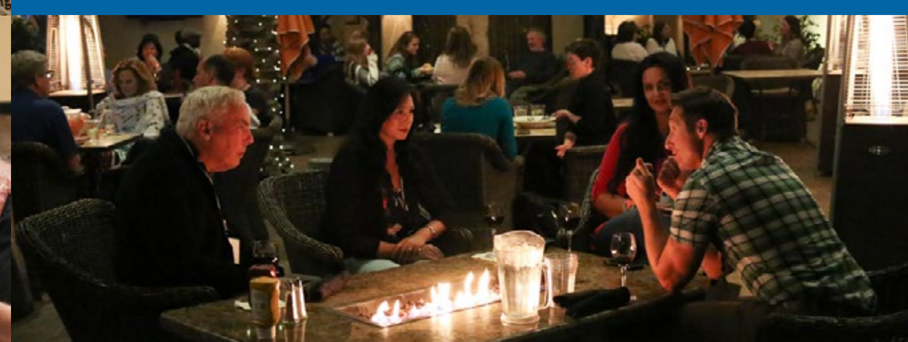




2016 Annual Report of the Financial Planning Association

Building a Community, Advancing the Profession






The 2016 Annual Report of the Financial Planning Association is your exclusive look into the activities and initiatives of your professional membership association. From conferences and original research to outstanding content from the *Journal of Financial Planning*, 2016 was a year full of opportunity for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals and all FPA members to grow personally and professionally. Thank you for your affiliation and your commitment to the financial planning profession.

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LETTER FROM THE
2016 FPA Executive Committee

In August 2012, FPA embraced a strategic directive that affirmed our association's bold vision and crystallized FPA's focus as the membership association for the financial planning profession. As we begin 2017, we are reminded of just how far we have come in realizing this vision of our professional home—FPA.

We went into 2016 confident that FPA would build on recent successes and further carve out its place in the profession. Two major watershed decisions the FPA Board of Directors made will take our association to new levels of success.

First, embracing the fact that FPA is a **community of communities**, the board moved forward with a plan to build an association of the future. An association that is committed to the alignment and integration of our members, communities and valuable content that helps drive member success. As you read this, FPA national and local leaders with the support of staff are working together to make this vision a reality. We call this vision "**OneFPA**" and it has the potential to revolutionize how FPA serves our members and network of chapters.

Our volunteer chapter leaders are engaging in ways that could not have been imagined in years past. Our corporate partnerships continue to explore new and exciting ways of connecting with FPA communities. Our support of the academia community not only builds upon the foundation of the body of knowledge, but also allows our members to nurture future leaders of the financial planning profession. OneFPA is more than a concept, it provides fresh and new ways of thinking about integrating the communities in our association and our key role in building the financial planning profession.

Second, recognizing that FPA desires to be a voice for our members and all financial planning practitioners, the Board of Directors approved the establishment of the FPA Member Advocacy Council (MAC). This new body will serve as an official mechanism for FPA to proactively solicit your input on regulatory and certifying body activities, processes and initiatives in an effort to formulate recommended positions and action items for the FPA Board of Directors. This is a positive step in the right direction toward giving you a more powerful voice on those issues that impact you, your business and your clients.

It has been our honor to serve as the Executive Committee of your association and we look forward to continuing our good work in 2017.

Sincerely,

EDWARD W. GJERTSEN II, CFP®
2016 FPA Chair

PAMELA SANDY, CFP®
2016 FPA President

SHANNON J. PIKE, CFP®
2016 FPA President-Elect

LAUREN M. SCHADLE, CAE
Executive Director/CEO

LETTER FROM THE

Executive Director/CEO

Almost four years into my role as executive director and CEO of your association, I feel as though we have really hit our stride as the membership organization for CFP® professionals and the financial planning community. This is thanks, in part, to the dynamic professional staff we have assembled who, in partnership with our Board of Directors and chapter leaders across the country, are working diligently every day to support you and help FPA carve out its place in the rapidly evolving professional membership association landscape

Over the past century, professional membership associations have played a noble and necessary function in American society, but due to massive changes in the landscape, many volunteer-driven associations like FPA are facing unprecedented challenges. To address these challenges, FPA is seeking to build a professional association of the future while leaning on a foundation of passionate volunteer leadership.

To build a thriving association that will stand the test of time, FPA is relying on sound business protocols such as lean business practices, values-based strategic thinking and planning, positive cultural development, and supporting innovation while adhering to a strategic framework that is focused on our core member to drive our success. Internally, we are fostering a culture of open communication among our staff and volunteer leaders that encourages our people to receive critical feedback and empowers us to fulfill their mission-critical roles. And we are embracing our roles as stewards of FPA's financial resources by examining how those resources are used and striving to make financial decisions that support the association's strategic directive and the development of our members.

We are confident that the decisions we have made and the critical business practices we have adopted over the past year are enabling FPA to put a stake in the ground as THE membership association for CFP® professionals and those who support the financial planning process.

Thank you for your membership and for making FPA your professional home!

Sincerely,

LAUREN M. SCHADLE, CAE
Executive Director/CEO

ABOUT THE
Financial Planning Association

With more than 23,000 members, including 17,000+ CFP® professionals, the Financial Planning Association® (FPA®) is the premier membership association for CFP® professionals and those who support the financial planning process. But what makes FPA unique is that it is actually a **community of communities**.

FPA is a network of chapters, a vibrant online community, nine Knowledge Circles, numerous committees and task forces, a growing NexGen community, a community of planners of all backgrounds, business and compensation models, small firms, mid-size firms, large firms, institutional members, and international members from around the globe.

FPA is focused on how to maximize the sharing of best practices and networking that can occur by integrating ALL of its communities. Imagine our communities are individual rooms in a house and FPA is THE house that brings all of the communities together into one interconnected web for the benefit of our members and the advancement of the profession.

"I belong to other organizations that are full of great people doing good work, but FPA are my people. We leap at the chance to share with the world the benefits of a relationship with a financial planner and believe in the primacy of a financial plan. We re-energize by listening to each other's experiences and guidance. We lead the profession, the government, and the public at large in the conversations about personal financial issues. FPA combines all of these, and more, for me."

Karl Frank, CFP®, AIF®
FPA Member
Englewood, Colo.

FPA was the result of a merger in 2000 of the International Association for Financial Planning (IAFP) and the Institute of Certified Financial Planners (ICFP) when both organizations made a conscious decision to rally around the CFP® marks because they knew that the marks represented what financial planning was and could be moving forward—the gold standard in financial planning. This focus on the CFP® marks was originally forged in 1987 by industry pioneer, P. Kemp Fain, Jr., who in his seminal paper—***One Profession, One Designation***—said:

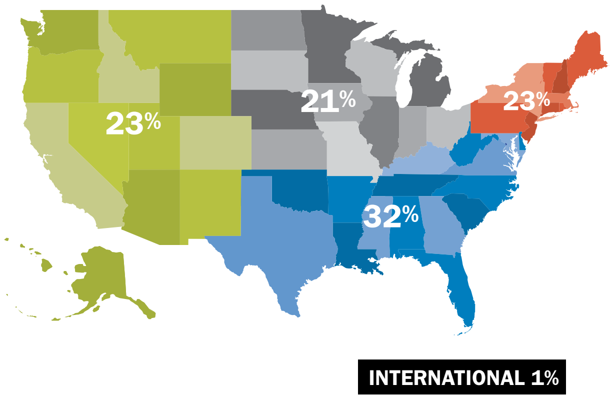
"It is a worthwhile goal for all financial planning organizations to join in unifying the professional segments of the financial services industry into one profession, with one recognized designation or credential, promulgated in the public interest."

While FPA welcomes anyone who supports the financial planning process, FPA believes in the long-term vision of building a profession around a set of requirements and standards that are in the profession's and public's interest. FPA recognizes the importance of rallying around a credential for the future of the profession and for the benefit of the public.

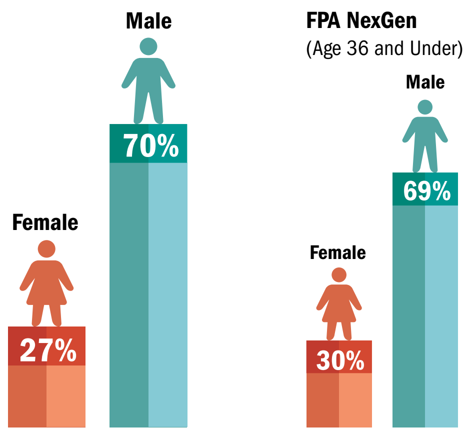
"FPA has provided exceptional opportunities to hone my technical and leadership skills by exposing me to relevant content and colleagues who are deeply engaged in the profession. I can count on FPA for their support and willingness to explore ways to enhance how we best serve one another for the greater good of all."

Lazetta Rainey Braxton, MBA, CFP®
FPA Member
Baltimore, MD

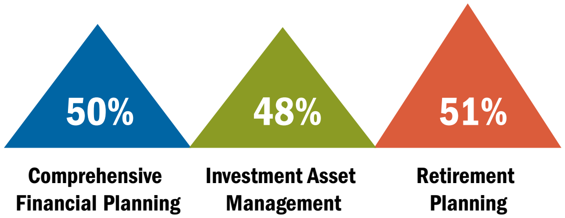
By Geographic Region



Gender



Areas of Specialty

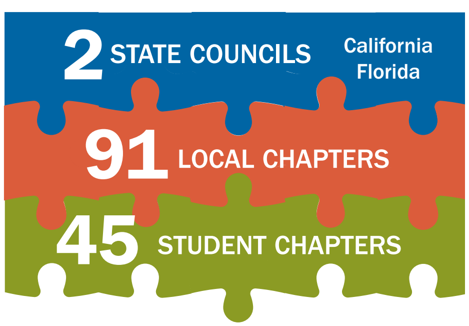


Average Years as an FPA Member

Average FPA member has been affiliated for 8.68 years

Average FPA CFP® professional member has been affiliated for 9.93 years

FPA Chapters



2016 FPA Award Winners

2016 P. Kemp Fain Jr. Award

Named for P. Kemp Fain, Jr., this award recognizes an individual who has made outstanding contributions to the financial planning profession.

Nominees for the award are professionals who have made significant contributions to the financial planning profession in the areas of service to society, academia, government and professional activities. The 2016 P. Kemp Fain, Jr. Award winner was Raymond Ferrara, CFP®.

2016 Heart of Financial Planning Award

This award recognizes individual professionals, financial planning firms, FPA chapters, or organizations who engage in extraordinary work, contributing and giving back to the financial planning community and public through financial planning. Recipients of this prestigious award embody the heart of financial planning and represent FPA's Core Values of integrity, competence, dedication to relationship building and stewardship. The 2016 Heart of Financial Planning Awardwas presented to Richard Salmen, CFP® , John Crosby, CFP® and Jim Peniston.

2016 Montgomery-Warschauer Award

This award honors the paper in the *Journal of Financial Planning* that provided the most outstanding contribution to the betterment of the profession in the preceding year. Sarah D. Asebedo, Ph.D, CFP® and Martin C. Seay, Ph.D., CFP® received the 2016 award for their article, "From Functioning to Flourishing: Applying Positive Psychology to Financial Planning," published in the November 2015 issue of the *Journal*.

National FPA Leadership in 2016

2016 FPA Board of Directors

Front Row (left to right):

2016 FPA President Pamela Sandy, CFP®; 2016 FPA Chair Edward W. Gjertsen II, CFP®; Executive Director/CEO Lauren M. Schadle, CAE; 2016 FPA President-Elect Shannon J. Pike, CFP®

Middle Row (left to right):

Michelle G. Carney, CFP®; Jack D. White, CFP®; Frank Paré, CFP®; Evelyn M. Zohlen, MBA, MS, CFP®; Michael Shockley, J.D., CFP®; John R. (Dick) Power, CFP®

Top Row (left to right):

Todd Stanard, CFP®, ChFC, CRPC; Catherine M. Seeber, CFP®, CeFT™; Shawn M. Brayman, ChFP, B.Sc, MES; Carol S. Craigie, MA, CFP®, ChFC; Dan Skiles

The passion of FPA members who are committed to the association's vision and role in building a profession for the financial planning community is evident among our dedicated volunteer leaders. FPA volunteer leaders devote countless hours of their time and for that devotion and service we are incredibly thankful.

Diversity Committee
- Michael D. Schiele (Chair)
- Alan J. Hiss
- Juan C. Ros, CFP®
- Joshua T. Hatfield-Charles, CFP®, ChFC, CLU, CEP
- D. Crystal Alford-Cooper, CFP®, CRC®, CDFA™
- Eric Toya, CFP®
- Katarzyna Marczyk, CFP®, CRPC
- Lazetta Rainey Braxton, MBA, CFP® (Liaison to Quad-A)
- Stuart Armstrong, CFP®, CLU, ChFC, CLTC, ADPA®, AIF® (Liaison to PridePlanners)
- Carol S. Craigie, MA, CFP®, ChFC (Board Liaison)

Ethics Committee
- Edward W. Gjertsen II, CFP®
- Pamela Sandy, CFP®
- Shannon J. Pike, CFP®

Finance Committee
- Shannon J. Pike, CFP® (Chair)
- Frank Paré, CFP®
- Dick Power, CFP®
- Michael Shockley, J.D., CFP®
- Shawn M. Brayman, ChFP, B.Sc, MES
- Pamela Sandy, CFP®

Legislative and Regulatory Issues Committee
- Michael A. Branham, CFP® (Chair)
- Kris Tower, CFP®
- Christopher S. Draughon, CFP®
- Erica L Feldblum, CFP®
- John J. Crosby, CFP®, ChFC, CLTC, CRPC
- James Lee, CFP®
- Michael Shockley, J.D., CFP® (Board Liaison)

Nominating and Leadership Development Committee
- Edward W. Gjertsen II, CFP® (Chair)
- Shannon J. Pike, CFP®
- Todd Stanard, CFP®, ChFC, CRPC
- Frank Paré, CFP®
- Dan Skiles
- Catherine M. Seeber, CFP®, CeFT™
- Shawn M. Brayman, ChFP, B.Sc, MES
- Michael A. Branham, CFP®

Awards/Recognition Committee
- Marguerita M. Cheng, CFP® (Chair)
- Roy T. Diliberto, CFP®, ChFC
- Jennifer B. Quigley, CFP®, CASL
- Leslie T. Beck, MBA, CFP®, CFA
- Trudy R. Turner, CFP®, CPA/PFS
- Don M. Blandin
- John M. Comer, CFP®
- John R. (Dick) Power, CFP® (Board Liaison)

Community Committee
- Michelle G. Carney, CFP® (co-chair)
- John A. Page, CFP®, RFP, RFC (co-chair)
- Mark L. Prendergast, CFP®, CPA, CDFA
- Carol S. Craigie, MA, CFP®, ChFC
- Barbara Kay, MA, LPC, RCC
- Anja Luesink, MBA CFP®, RLP®, CeFT®
- Joseph D. Clemens, CFP®, EA
- Martin Kurtz, CFP®, AIFA®
- Elizabeth W. Jetton, CFP®
- Robert J. Franz III, CRC

FPA Knowledge Circle Hosts

Business Success Knowledge Circle
- Molly Balunek, CFP®
- Barbara Kay, MA, LPC, RCC
- Emily M. Chiang, MBA, CFP®

Estate Planning Knowledge Circle
- Robert C. Phillips, CFP®, CFA, CPA
- Melissa A. Kemp, CFP®, AEP
- Paul Sowell, Esq.

Investment Planning Knowledge Circle
- A. Raymond Benton, CFP®, CRPC, EA
- Janet L. Larsen, CFP®, CeFT®, APMA®
- Charles Sherry, M.Sc.
- Claudia S. Cypher, CFP®

International/Cross Border Knowledge Circle
- Jeffrey J. Crampton, CFP®, CFA
- Robert Van Beek, CFP®, EFA
- Brian Wruk, CFP®, TEP, CIM

Public Policy and Regulation Knowledge Circle
- Edward W. Gjertsen II, CFP®

Retirement Planning Knowledge Circle
- Bob Rall, CFP®
- Dan Serra, CFP®, CDFA, ADPA, EA
- Richard W. Kawaga, CFP®, MSFS, CLU, ChFC

Tax Planning Knowledge Circle
- William M. Harris, CFP®
- Lora J. Hoff, CFP®
- Michael W. Olff, CFP®, EA

Theory in Practice Knowledge Circle
- Chris M. Browning
- Dr. Margaret "Peggy" Doviak, Ph.D., CFP®
- Dr. Martin Seay, Ph.D., CFP®
- Daniel Moisand, CFP®
- Women in Finance Knowledge Circle
- Janice M. Cackowski, CFP®
- Dr. Laura H. Mattia, Ph.D., MBA, CFP®
- Jocelyn D. Wright, CFP®

Pro Bono Committee
- Frank Paré, CFP® (Chair)
- Omega Hartman, CFP®
- Michael J. Zmistowski, CRC, RFC
- Lori Irwin
- Renee M. Porter-Medley, CFP®
- Elizabeth W. McClelland, CFP®
- Scott Kahan, CFP® (Foundation for Financial Planning Board Liaison)
- Todd Stanard, CFP®, ChFC, CRPC (Board Liaison)

FPA Annual Conference Task Force
- Susan M. Mitcheltree, CFP® (Chair)
- D. Crystal Alford-Cooper, CFP®, CRC®, CDFA™
- Laurie A. Belew, MS, MBA, CFP®
- Richard J. Durso, CFP®, AEP
- Kathleen Sindell, Ph.D.
- Jeffrey N. Tomaneng, CFP®, CLU, CIMA

OneFPA Advisory Group
- Catherine M. Seeber, CFP®, CeFT™ (Chair)
- Evelyn M. Zohlen, MBA, MS, CFP® (Chair-Elect)
- John F. McAvoy, CFP®, AIF®
- Jorge Padilla, CFP®, AIF®
- Krysta M. Patterson
- Darin R. Shebesta, CFP®
- Marta Shen, J.D., CFP®, CPA, AIF®
- Bonnie A. Stanley
- Suparna M. Tirukonda, CFP®, CCPS

Residency Task Force
- Elissa Buie, CFP®
- Dr. Dave Yeske, DBA, CFP®
- Sabrina Lowell, CFP®
- Nicholas A. Nicolette, CFP®
- Diane S. Bourdo, CFP®
- James R. Johnson, CFP®

Retreat Task Force
- Elizabeth W. Jetton, CFP® (Co-Chair)
- Martin Kurtz, CFP® (Co-Chair)
- Scott Kahan, CFP®
- Hannah Moore, CFP®
- H. Jude Boudreaux, CFP®
- Neal Van Zutphen, Jr., MS, CFP®, FBS

Career Advisory Group
- Kathleen Sindell, Ph.D.
- Dr. Tom L. Potts, Ph.D., CFP®
- Steven Clark, EA
- Dr. Ruth H. Lytton, Ph.D.
- Joyce Schnur, MBA, CFP®, ChFC
- Dr. Benjamin F. Cummings, Ph.D., CFP®
- Jonathan T. Guyton, CFP®
- Shawn M. Brayman, ChFP, B.Sc, MES

FPA NexGen®
- Rianka R. Dorsainvil, CFP® (President)
- Rachel F. Fieweger, CFP® (President-Elect)
- Laurie A. Belew, MBA, MS, CFP® (Chair)
- Derek Lawson, MS, CFP® (Secretary)
- Michelle G. Carney, CFP® (Board Liaison)

FPA Political Action Committee (FPA PAC)
- Janet A. Stanzak, CFP® (Chair)
- Dr. Dave Yeske, DBA, CFP®
- Keith A. Loveland, J.D., AIFA®, CIDA, GFS
- Stuart H. Armstrong II, CFP ®, CLU , CLTC, ADPA

A Look Ahead to 2017

2017 will prove to be a watershed year for FPA as we continue our work in fully aligning the association at all levels and integrating content, partners and programs across our network of chapters to drive value for members and make the vision of **OneFPA** a reality. This important work will help make FPA an indispensable force in your life and in the lives of all financial planning professionals.

FPA will review all benefits and programs in 2017 to ensure they are continuing to add value to your membership and explore new opportunities that help you and all members grow as professionals, serve your clients, and build profitable businesses. While we will be hosting memorable conferences this year like the 2017 FPA Annual Conference and 2017 FPA Retreat, and build out a robust library of content to support you and your business, we are working on several initiatives that support our members, move us closer to realizing "OneFPA," and further our goal of building an association of the future.

As a volunteer-driven and led association, it is critical that FPA devote resources to **leadership training and development** that will allow us to identify and train volunteers who will be our association leaders now and in the future. By developing a mechanism that allows FPA to tap into the passionate, talented members within our ranks, our association will thrive in the years to come nationally and locally. And those important leadership skills that are taught and embraced will also allow those members to be impactful leaders within their businesses and in the greater financial planning profession.

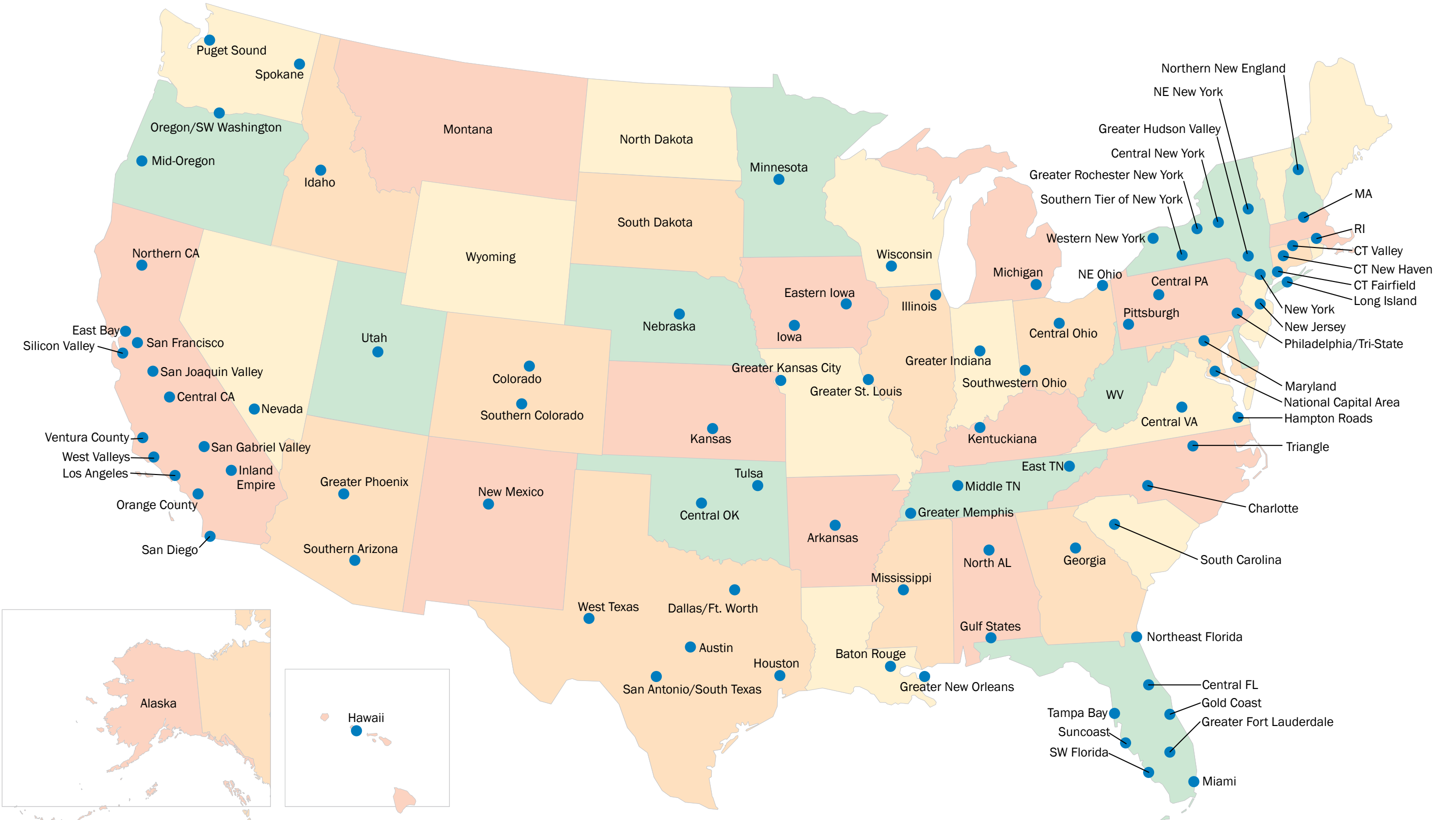
FPA is proud to be a voice for financial planning professionals and to help the association embrace this important role we have launched the **FPA Member Advocacy Council (MAC)**. The MAC is ramping up their work and is reviewing issues members have related to the activities, programs and initiatives of regulatory and certifying bodies. Their review of these matters will result in recommendations for organizational positions so FPA can serve as your voice to those bodies that impact you and your profession.

As you have seen throughout this Annual Report, FPA proudly boasts of tremendous content that stems from a number of programs and activities, including conferences, the *Journal of Financial Planning*, FPA Knowledge Circles, the Virtual Learning Center and our many outside partners. This year we are working to **fully integrate our content** into an interconnected web that will provide our members with a seamless learning opportunity that allows members to accrue needed skills and builds the base of professional knowledge.

FPA is also currently reviewing our technology platforms that power the association. This careful review will result in needed improvements and the adoption of new technologies that will support content delivery and **better connect the many communities** that comprise FPA. Harnessing and leveraging the right technology in this advanced digital age is crucial for any association…especially for an association like FPA that has many communities that allow members to engage with their peers.

While FPA is planning for each of these programs, there is much more taking place that is solidifying FPA as your professional home. You're encouraged to consider your personal and professional goals for the year and explore how FPA can help you realize your vision of success in 2017!

The FPA Chapter Network



FPA would like to recognize the outstanding volunteer leaders who have committed their time and talents to leading chapter boards in 2016. Their support of our association locally has made it possible for our members to fully tap into the power of our dynamic community.

While FPA is a national association that brings the financial planning community together, it is through the network of 91 chapters and two state councils coast-to-coast that makes it possible for members to learn, share and grow with their peers locally.

FPA of Arkansas
- Thomas J. Knight, CFP® (2016 President)
- Ronald G. Cantrell, CFP®
- Angie S. Johnson, CFP®
- Ryan B. Boyd, CFP®
- Tim Long, CFP®, CRPC
- Loren M. Ipsen, CFP®
- Josh Varvil (Chapter Executive)

FPA of Austin
- Laurence Egle, CFP® (2016 President)
- Lisa D. Fox, CFP®
- Darleen M. Gilmore, CFP®
- Shane Sullivan, CFP®
- Gary R. Rodgers, CFP®, CPA/PFS, ChFC
- Brittany Farris McGehee
- Chris Stolte, CFP®, AIF®, ChFC, CLU
- Daphne Jordan, CFP®
- Lewis Weil
- Mark Herman
- Joe Inskeep
- Susan Palombo, CFP®
- David Cook
- Bill Simonet, CFP®, AIF®
- Sarah Frankenfeld (Chapter Executive)

FPA of Baton Rouge
- Corey P. Luckett, CFP®, AIF® (2016 President)
- Mary K. Martin, CFP®, CDFA
- Craig A. Kliebert, CFP®
- William F. Campbell, Jr., CFP®, CLU, ChFC
- Frances C. Lawrence, Ph.D.
- Paige Johannessen
- Kellie B. Searles
- Linda S. Rodosta
- Daniel Wendt
- Jeanne Takyi (Chapter Executive)

FPA of Central California
- Jeffrey S. Karst, CFP® (2016 President)
- David L. Williamson, CFP®
- Ryan J. Louie, CFP®
- Derek Elrod
- Ashlee Veneman
- Katie M. Nelson (Chapter Executive)

FPA of Central Florida
- Jonathan Colby Winslow, CFP®, EA (2016 President)
- Larry Breen, CFP®, CLU, ChFC
- John T. Cash, III, CFP®
- Randall R. Harrison, CFP®
- James J. Flick, J.D.
- Rhonda Shurtleff, CFP®, CDFA
- John M. West, III, MBA, CFP®
- Marisa Bradbury, CFP®
- Diane A. Layton (Chapter Executive)

FPA of Central New York
- Uri (Chip) Doolittle, CFP®, AIF® (2016 President)
- Caragh D. Fahy, CFP®
- Thomas M. Griffith, ChFC
- John Lemondes
- Bryan J. Parmley, CFP®, AIF®
- Daniel P. Jeffery, CFP®
- Mark Hills
- Joseph Lazzaro, CFP®
- Richard J. Naylor
- Mike Doolittle, CLU, CLF
- Thomas Mordaunt
- Jennifer Spagnola (Chapter Executive)

FPA of Central Ohio
- Martina Peng, Ph.D., CFP® (2016 President)
- Michael H. Mulhern, CFP®, CPA
- Paul J. Dolce, CFP®
- James D. Atkinson, CFP®, AIF®, MPAS
- Kristen E. Moosmiller, CFP®
- Isao L. Shoji, CFP®, CLTC
- William Vasil, CFP®
- Gregory R. Johnson, CFP®, CAP®
- Michael P. McMeans, CFP®
- J. Grant Mosher
- Adria M. Rosebrock, CFP®, NSSA®
- David C. Bowman
- Kevin Spray
- DebbieLee Dougherty, CAE (Chapter Executive)

FPA of Central Oklahoma
- John T. Clement, CFP® (2016 President)
- Margaret "Peggy" Doviak, Ph.D., CFP®
- Christi S. Powell, CFP®
- Jeffrey B. Yamada, CFP®
- Levi Wade, CFP®
- Symphony Charles (Chapter Executive)

FPA of Central Pennsylvania
- William J. O'Leary III, CFP® (2016 President)
- Lon K. Jury, CFP®, ChFC, CLU
- David A. Welber, CFP®
- Donald F. Weaver, CFP®
- Frederick R. Blair, AAMS
- Ralph J. Fetrow, CFP®
- Tami Noll Russo, CFP®, CPA, CLU
- Steven F. Bell, CFP®
- Seth William Arbogast, CFP®
- Anne Friedman, CFP®
- Derek Nowak
- David Dinger
- Brian A. Fields, CFP®
- Laura Dogger
- G Thomas Page, CFP®
- Melissa Simpson (Chapter Executive)

FPA of Central Virginia
- Wendell B. Fuller, CFP® (2016 President)
- Jamie L. Malone, CFP®, CPA
- Lisa R. Hatcher, CFP®
- Thomas F. Blackburn, CFP®, CPA/PFS
- Jeremy K. Kuhlen, CFP®, CRPS®, AIF®
- Karen D. Hawkins, CFP®
- James T. Warns, Jr., MBA
- Charles O. Ricketts, CFP®
- Peter W. Tomasch, CFP®
- Cynthia L. Levine, CFP®, CPA, EA
- Joseph R. Stemmle, CFP®, CRPC
- Philip J. Wallin, CFP®, CPA
- Brian Welch, CFP®
- Mila D. Spaulding (Chapter Executive)

FPA of Charlotte
- Sandra B. Carlson, CFP®, CPA, CDFA (2016 President)
- Sherry K. Teat, CFP®, CPA/PFS
- Don Stamas, CFP® CLU®
- Brandon W. Davis, CFP®
- Angela N. Bellamy, CFP®, ChFC, ADPA®
- Chason Trahan, CFP®
- Laura L. O'Dea, CLU
- Andrew Savant
- Philip T. Withers
- J. Eric Kindberg
- Eugene C. Curtis (Chapter Executive)

FPA of Colorado
- Andrea L. Blackwelder, CFP®, ChFC (2016 President)
- James R. O'Brien, CFP®
- Jan Jordan
- Sara Gardner, CFP®
- Wendi Strom, CFP®
- Joseph D. Clemens, CFP®, EA
- Natalie P. Wagner, CFRC
- Charles Sherry, M. Sc.
- Jon Hokama
- Brian Williams
- Rush B. Steelman, Jr.
- Randy J. Anderson, CFP®
- Rebecca L. Kennedy, CFP®
- Kris Tower, CFP®
- Rachel E. Comfort
- Debbie K. Reece, CMP (Chapter Executive)

FPA of Connecticut–Fairfield County
- R. Michael Parry, CFP®, CSA (2016 President)
- Elizabeth J. Galindo
- John Massih
- Colin C. Grover, CFP®
- Derrek L. Metz, CRPC
- Lori L. Somerville (Chapter Executive)

FPA of Connecticut–Greater New Haven
- Thomas P. Morrone, CFP®, CPA (2016 President)
- Thomas J. Casey, CFP®
- David R. Pruett
- Paul Morrone, CFP®, CPA, MSA
- JoAnne DePalma, CFP®
- Lori L. Somerville (Chapter Executive)

FPA of Connecticut Valley
- Jason Gentile, CFP® (2016 President)
- Carl M. Christie, MBA, CFP®, CFS
- Robert J. Tarlov, CFP®, CLU, ChFC
- John W. Eckel, CFP®, CFA
- Jeffrey P. Euting, MBA, CFP®
- Patricia C. Kane, CFP®
- Stephen Mok
- Jaclyn Farnham (Chapter Executive)

FPA of Dallas/Ft. Worth
- Albert E. Dean, III, CFP®, EA (2016 President)
- William E. Dendy, J.D., CFP®, CPA/PFS
- Jaime Boyles, CFP®
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- Craig S. Clark, CFP®
- George K. Bidjov, CFP®
- Elise Murphy, CFP®
- D. Jeffrey Buckley, Esq., CFP®
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- Megan M. Heintzkill, CFP®
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- Jeffrey Schouten
- Julie Coombs, CFP®
- Vanessa Welter
- Clint R. Wondra, CFP®, CPA/PFS
- Brenda A. Matthias (Chapter Executive)

"I would never have started my business without the support of the members of our FPA chapter. Just the fact that they were there and I could reach out, and learn from their experiences made me go forward and grow my business. Getting experience and gaining the confidence that I do the right things for my clients is what I learned from FPA. Become active in your chapter as it is very rewarding, places you as a leader in your community and you will gain life experiences that you can bring back to your clients. Create your own value in FPA. The more you put in, the more you will get back."

Anja Luesink, CFP®
FPA Member
New York, NY

The One Connection™

There are any number of organizations that today's financial planning professional can go to access resources and content, but only FPA is in a position to provide members with *One Connection*™ to opportunities for Professional Development, Business Success, Advocacy, and Community.

Everything we do as an organization supports our role in providing members and the financial planning community with opportunities to become more knowledgeable professionals and more successful business people, while also providing practitioners a voice on issues that impact their profession and a means to connect with their peers. We do this through thoughtful collaboration with industry thought-leaders, partners and our network of chapters across the country.

Professional Development

To increase proficiencies, CFP® professionals and financial planners must have access to the latest trends and information in financial planning, investments, risk management, estate planning, taxes, marketing, practice management and more. Access to these resources helps advance professional skill sets and knowledge while accruing valuable Continuing Education (CE) credits. FPA makes it easy for financial planners of all backgrounds and compensation models to learn.

2016 Conferences and Events

FPA Annual Conference – BE Baltimore 2016: The largest gathering of CFP® professionals and thought leaders in financial planning took place mid-September in Baltimore. The event attracted more than 1,700 attendees from across the country and the world to experience two and a half days of highly rated speakers, continuing education sessions and roundtable discussions, not to mention numerous exciting pre-conference activities.

– **Student Volunteer Program:** FPA tapped into the energy of university student groups as volunteers at the FPA Annual Conference. Nearly 100 students, faculty and FPA members benefited from the many networking opportunities and educational sessions offered at the event.

2016 FPA Retreat: With a long history of bringing the best minds in the financial planning profession together to learn and engage in deep conversations about the art and science of financial planning, FPA Retreat is often referred to as a multi-generational think tank dedicated to challenging attendees on how they "practice" financial planning. In April, over 360 financial planning professionals gathered at the Wigwam Resort outside of Phoenix to experience three days of advanced presentations, compelling peer-to-peer learning sessions and many hours of highly engaging conversations.

2016 FPA Residency: In October, 35 residents (New or soon-to-be CFP® professionals) gathered in Denver for six intensive days of study with Dean Elissa Buie, CFP® and Mentors Dave Yeske, CFP®, Diane Bourdo, CFP®, Nick Nicolette, CFP®, Jim Johnson, CFP® and Sabrina Lowell, CFP®. In this highly acclaimed program, the residents learned how to best communicate with clients through role-playing with mentors and peers to become fully prepared for the challenging life situations they will experience with their clients.

2016 FPA NexGen® Gathering: This meeting of 115 of the best and brightest minds of the next generation of financial planners took place in June on the University of Texas campus in Dallas. Attendees took advantage of this opportunity to discuss the hot topics and trends facing the future of the financial planning profession and to get to know their peers, colleagues and FPA leadership in an intimate and free-flowing setting.

Publications

***Journal of Financial Planning*:** The official publication of the Financial Planning Association, the *Journal* continues its long-standing tradition to provide groundbreaking research for practitioner use in real-life planning with clients, and to champion the effort to align scholarly research and practitioner needs that foster the greatest collaboration of talents in the field. Editorial highlights in 2016 include guidance on the DOL Final Rule and research-based papers on the taxation of Social Security benefits and strategies for redoing prior Social Security claiming decisions. Each issue of the *Journal*, including archived issues, provided CE credit and for 10 years in a row, and the *Journal* received an APEX Award for Publication Excellence.

***Financial Services Review*:** This quarterly, peer-reviewed, academic journal encourages research that examines the impact of financial issues on individuals. Its primary purpose is the publication of traditional academic empirical research. Co-published by the Academy of Financial Services and FPA, members receive exclusive access to digital editions. In 2016, continuing education exams in each issue were introduced, offering FPA members four additional CFP® CE credits each year at no cost.

***FPA Practice Management Blog*:** Powered by the *Journal of Financial Planning*, the FPA Practice Management Blog provides FPA members with relevant practice management tips on a weekly basis. 2016 was a record-breaking year for the blog, with more than 30,000 unique visitors getting expert advice from how to create an ideal client profile to how to create a sound social media policy.

***FPA SmartBrief*:** Distributed to more than 19,000 professionals, *FPA SmartBrief*, a twice-weekly electronic newsletter provided the latest news and happenings from around the profession as reported by a variety of industry trade and consumer publications.

Professional Education Programs

With over 50 live webinars each year, hundreds of on-demand recordings, and numerous peer-to-peer and mentoring offerings, FPA's professional education programs offer essential knowledge, designed and delivered by the top leaders in the profession. More than half of the programs offer CE credit that exceeds the CFP® professionals' yearly requirement, and provide opportunities for growth and improvement at all career stages. Highlights from 2016, include:

***Journal in the Round*:** A monthly online roundtable where writers to the *Journal* and other experts are invited to illuminate and debate the issues and ideas on and beyond the pages of the magazine. The series, which launched in late spring 2016 and is free to members, has tripled its audience size and demonstrates the value of bringing great *Journal* content, often with CFP® CE credit, to our lively FPA online communities.

Collaborative Learning: These programs provide professionally designed and delivered content and materials, education solutions that are cost-effective, convenient and that provide great forums to network with colleagues. Groups and chapters can host CE eligible "In a Box" ethics or communications course, or live stream any webinar from our online catalogue. The popularity of "Ethics in a Box" is growing as the program has been utilized by over 20 chapters and corporations since May 2016.

2016 Financial Planning Challenge: A three-phase competition hosted by FPA, CFP Board and Ameriprise Financial, that supports the next generation of financial planners and culminates in a final round held at the FPA Annual Conference and promotes the profession of financial planning as a vibrant community and viable career choice. In 2016, eight universities competed for the top prize of $10,000 in scholarship money for their school and a full scholarship for the winning team to attend the highly acclaimed FPA Residency program. The winners of the 2016 Financial Planning Challenge were William Paterson University (first place), University of Akron (second place), and Kansas State University (third place).

FPA MentorMatch: Pairs a mentee with a qualified mentor focusing on advancing the member's career goals. Members are matched with a fellow FPA colleague based on expertise, learning style, interpersonal skills and behavior, professional interest, and educational background.

"The FPA Annual Conference is the only place where the focus of delivering financial planning advice is at the core of the conversation. And with the conference attracting both U.S. and international financial planners who seek to share, learn, network and laugh, the opportunity to hear how financial planners assess different client situations through the lens of their country's rules and regulations is fascinating to me."

Mark S. Freedman, CFP®
FPA Member
Peabody, Mass.

Business Success

Creating a successful, profitable business takes time and a keen knowledge of the issues that dictate business performance. FPA offers a robust platform of business building tools and resources that directly add to members’ bottom lines.

FPA Research and Practice Institute™

The FPA Research and Practice Institute™ conducts original research on profession-related, business-centric, and financial planning topics, which is not only accessible to members, but also serves as content for the *Journal of Financial Planning*, FPA events, and other programs. In 2016, the FPA Research and Practice Institute™ conducted three research studies, including:

2016 Trends in Practice Management: An update to the research that officially launched the FPA Research and Practice Institute™ in 2013, the research examined several key areas on practice management and led to the development of three whitepapers that help practitioners define, communicate and monetize their business value.

2016 Trends in Investing: Conducted each year in collaboration with the *Journal of Financial Planning*, the research looked at how financial planners are investing today and how it will change in the next 12-months. Among the key findings was that Exchange-Traded Funds are increasing in popularity and have become the most recommended investment vehicle by the planning community.

Is Your Data Safe? The 2016 Financial Adviser Cybersecurity Assessment: To ascertain the understanding of key cybersecurity issues and the readiness by financial planners to address cyber threats, FPA partnered with TD Ameritrade Institutional on this research, which has led to the development of whitepapers designed to help practitioners apply the research to their respective businesses.

FPA Member Advantage Program

With 63 partners providing deep discounts on services and products designed to help financial planners operate more successful businesses, the FPA Member Advantage Program offers members robust savings on everything from technology and software to marketing and compliance services. With many new discounts to be added in 2017, members can look to FPA as a vital partner in their business success.

Some of the most used programs are:

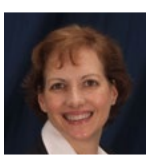
- With 12 percent of FPA members participating at the end of 2016, the FPA Group Long Term Disability and Group Term Life programs, offered in partnership with Ryan Insurance Strategy Consultants, are the most used benefit in the FPA Member Advantage Program.
- By securing an exclusive $300 discount on MoneyGuidePro for FPA members—the best discount they offer anywhere—this addition to the FPA Member Advantage Program in 2016 qualifies as the biggest “win” for our members.
- With the need for financial planners to ensure they are in compliance with the U.S. Department of Labor’s Final Conflict of Interest Rule, FPA added a 15 percent discount on Compliance Guardian in 2016 and will be making additional benefits available to members to help them address this important matter in 2017.

FPA PlannerSearch®

In 2016, FPA redeveloped and relaunched FPA PlannerSearch®, a website that not only provides educational content to consumers on personal financial matters, but also helps them find and engage CFP® professionals. By using best practices in Search Engine Optimization (SEO), social sharing, and structured data, the site increases the likelihood of CFP® members of FPA being found online. Traffic to the site and the number of leads generated has increased dramatically since May 2016. Organic traffic to the site is up 181 percent and the number of planner inquiries submitted by consumers has increased 818 percent.

FPA MediaSource

To help members generate more visibility, FPA created FPA MediaSource as a way of connecting national consumer and trade media with CFP® professional FPA members. The system automates the process for journalists who are looking to identify and interview financial planners for their stories. Members who want to participate in FPA MediaSource must attend an FPA-approved media training, which helps members better understand how to work with the media. More than 900 members are participating and those members have had access to nearly 1,700 journalist queries at the end of 2016.

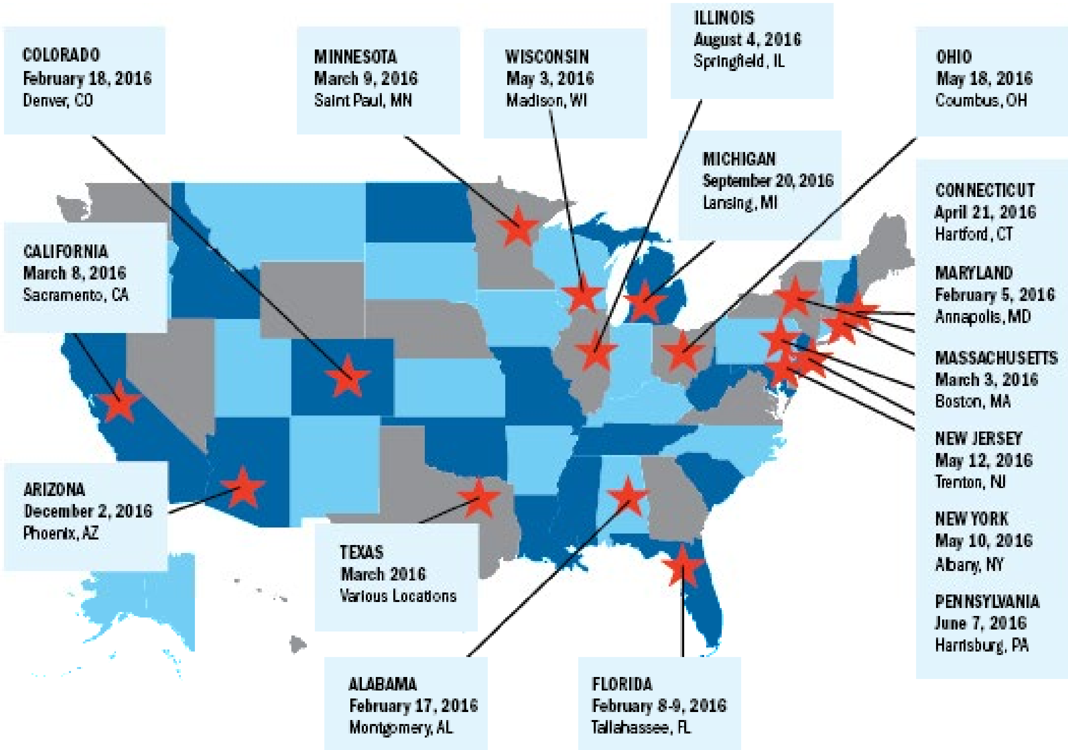


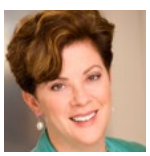
"While perusing the FPA website, I happened to notice the offer of a 20% discount on the planning software I use, which was just coming up for renewal. When I called the provider and mentioned my FPA membership (Bingo!) annual savings that just about paid for my FPA membership! I won't even get into the other benefits I've derived over the years from my FPA membership. The relationships and ties I've developed from being actively involved, on both the local and national level, are, as the saying goes, 'priceless.'"

Leslie T. Beck, MBA, CFP®
FPA Member
Wood Ridge, NJ

Advocacy's role in any professional association is designed to guarantee members are held in high regard at all levels. FPA gives CFP® professionals a powerful voice in ongoing deliberations about professional standards and potential laws that may impact those who provide financial planning services and investment advice.

In 2016, State Advocacy Days were held in the following states:





"After participating in Advocacy Day events and meeting with state officials in Sacramento and with legislators in our nation's capital, I view advocacy as essential to achieving the full potential of financial planning as a profession. Our association's success in obtaining favorable federal regulations to protect retirement plan savers from unscrupulous sales practices was a highlight for me. We were the proverbial 'David' confronting 'Goliath' and far outnumbered and out spent by opposing groups. I experienced firsthand the value of our member volunteers as 'boots on the ground' making our voices heard on the Hill and leveraging our staff resources. The old adage, 'If you're not at the table, you could be on the menu,' rings especially true for me now!"

Alice C. King, J.D., CFP®
FPA Member
Petaluma, Cali.

National Advocacy Day

On June 23rd, 66 FPA Members joined together in Washington D.C. for FPA's 3rd Annual Advocacy Day. Our members from 18 states met with over 100 offices to discuss issues that are crucial to advancing our profession and to protect our members from harmful legislation.

- Our Executive Committee met with senior White House staff, the U.S. Department of Labor (DOL), and the Securities and Exchange Commission (SEC).
- FPA Leaders met with House Financial Services and Senate Banking Committee senior staff to discuss the DOL Conflict of Interest Final Rule and increasing investment adviser oversight.
- FPA members met with their Members of Congress and staff to also emphasize FPA's commitment to Pro Bono volunteerism with seniors, veterans and struggling families. We have partnered with Members of Congress in their home districts to provide pro bono content in townhalls, senior workshops, and veterans events.

We continue to refine and enhance our advocacy program and in 2016 brought on a legislative monitoring service, GovHawk, to proactively be aware of legislation in 2017 general assemblies that might help or pose a threat to our CFP® professional members and their firms.

Financial Planning Coalition

FPA partners with the Certified Financial Planner Board of Standards (CFP Board) and the National Association of Personal Financial Advisors (NAPFA) to form the Financial Planning Coalition. Together, we form policy positions on joint issues that support or pose a threat to our stakeholders. Our commitment to a fiduciary standard both at the DOL and the SEC supports our CFP® professional members and advocate federally for the increased examination of investment advisers. The recognition and regulation of financial planners is a long-term goal, so we seek to strengthen existing financial planner regulations and statutes through an enhanced enforcement strategy.

FPA Political Action Committee

The FPA Political Action Committee (FPA PAC) is the **only** PAC for financial planners and financial planning and has helped build valuable relationships on Capitol Hill to educate Senators and Representatives about the financial planning profession and support candidates to help them understand FPA's policy objectives. The FPA PAC is a separate entity governed by a separate board of directors with separate bylaws.

The FPA PAC increased its disbursements in the 2016 campaign cycle to over $82,000, the highest since 2007. We balanced our disbursments to leaders and Members of Congress who serve on essential financial services committees and who vote on issues crucial to our policy positions. In 2016, the FPA PAC gained the association access to key Members of Congress at events off the Hill. Those meetings included leadership and members from the following committees:

- Capital Markets Committee
- House Financial Services Committee
- Senate Banking Committee
- House Ways & Means Committee

Community

One of the most profound benefits of affiliation in professional associations is the opportunity to learn, share and grow with fellow members. FPA facilitates and encourages sharing and camaraderie between members—in person and online.

Virtual Community

FPA Connect is a secure engagement platform that provides the opportunity for FPA members to network, acquire knowledge, share expertise and grow with others at every stage in their financial planning career. On FPA Connect, members can learn, volunteer, participate, join FPA Knowledge Circles and reach out to other professionals for advice and support. The more involved our members become, the more they realize the value and full potential of their FPA membership.

Communities of Interest

- **FPA Knowledge Circles:** These nine content-specific communities bring members together to learn and share through hosted peer-to-peer conversation online and in-person. Directly aligned with the *Journal of Financial Planning* and working hand in hand with the *Journal in the Round* series, these specialty communities offer monthly meetings and are open to any member. FPA Knowledge Circles are growing and currently have 4,472 active participating members.
- **FPA NexGen®:** The FPA NexGen® community is comprised of nearly 2,000 members who are 36 or younger and active in the financial planning profession. The community, which includes 33 local NexGen communities, is committed to ensuring transference of wisdom, tradition and integrity, from the pioneers of financial planning to the next generation of our profession. In 2016, FPA NexGen® achieved several major goals, including:
  - Another sellout of the FPA NexGen® Gathering (conference) in Texas.
  - Delivery of NexGen-focused content at the FPA Annual Conference and at FPA Retreat.
  - A session about working with NexGen members and communities at the OneFPA Chapter Leaders Conference.
  - Growing the number of local FPA NexGen® communities working with chapters.

FPA Pro Bono

FPA, through the passion and dedication of our members and nationwide network of chapters, is committed to assisting individuals in underserved populations. FPA chapters are central to providing support and guidance to thousands of Americans struggling to financially achieve their goals and dreams through a variety of community outreach programs, including:

- **14th Annual Financial Planning Week:** This yearly program took place October 3–7, 2016, and brought financial planning educational activities, personal finance workshops, hotlines and more to consumers across the country.
- **Financial Planning Days:** Occurring throughout the year, the program harnesses the collective efforts of FPA chapters, members, and key strategic partners to create one-day opportunities for individuals to gain access to financial planning education, resources, and connect with financial planners. In 2016, 455 FPA members representing 24 chapters volunteered across the country to help more than 2,000 individuals address their financial concerns. The program is hosted by FPA, CFP Board, the Foundation for Financial Planning, and the U.S. Conference of Mayors.
- **Pro Bono:** In partnership with the Foundation for Financial Planning, FPA chapters help thousands of Americans each year by providing much needed one-on-one financial advice and counseling at no cost. The pro bono financial planning events are held in recognition of the fact that not everyone can afford to work with a financial planner, but everyone can benefit from the advice financial planners provide.

FPA Focus on Diversity and Inclusion

FPA seeks to raise awareness and promote an environment that embraces diverse communities of consumers and professionals. In so doing, FPA strives to increase opportunities and access for the widest spectrum of people so that all may join, collaborate and thrive within an inclusive financial planning community. This is primarily done through:

- **FPA Diversity Scholarships:** Merit-based scholarships to bring individuals of diverse backgrounds, or those serving diverse communities, into the FPA community through attendance to FPA conferences (FPA Annual Conference or FPA Retreat) and included travel and lodging, a one-year FPA membership, and chapter meeting fees. In 2016, FPA awarded scholarships to Catalina Franco-Cicero (FPA Retreat), Yi “Bessie” Liu, M.S. (FPA Annual Conference), Diane Marie Manuel, Ph.D., MBA, CFP® (FPA Annual Conference), and Lauryn Williams, MBA (FPA Annual Conference)
- **FPA Diversity and Inclusion Content:** Delivered to members and chapters through a number of programs, including the FPA Virtual Learning Center, chapter meetings, and at FPA conferences.

“FPA is a community of dedicated peers who are committed to the financial planning process. Within FPA I am very lucky to be part of and lead the FPA NexGen® community, which continues to grow as a cohesive group, produce thought leaders and dynamic professionals who are moving the profession forward. FPA gives me a place to call home.”

Rianka R. Dorsainvil, CFP®
FPA Member
Lanham, Md.

FPA is a sought after partner by companies and organizations that desire to support the work of the association while directly benefitting the growth and success of our members. But as major changes are taking place within the financial services sector, major changes needed to take place in how FPA works with corporate partners. FPA is uniquely positioned to take a more proactive leadership position and be a guiding light for the financial planning community.

Over the years, the support of corporate partners has enabled FPA to enhance the body of knowledge that drives the financial planning profession, while directly impacting the bottom lines of its members. Given the critical changes taking place in the profession, and based on candid feedback from both partners and members, FPA has designed a more thoughtful, strategic approach to its alignment with corporate partners that we call the Cornerstone Partner program.

The goal is to identify partners where more robust strategic relationships are created. By taking this approach, FPA and the Cornerstone Partners can bolster educational offerings, integrate content and provide a more impactful experience to members and all CFP® professionals.

Cornerstone Partner

In October, FPA was pleased to announce that Vanguard officially signed on as the association's first Cornerstone Partner.

Since 1975, Vanguard has been one of the marquee names in financial services. Not only do they serve investors with a proven, time-tested, client-focused methodology, but they are committed to helping those who serve investors be more knowledgeable and skilled in doing so. They also share in FPA's commitment to the financial planning community, the professional growth of CFP® practitioners and belief that financial planning must be delivered in a competent, ethical and transparent manner.

Strategic Partners

Also in 2016, FPA announced that Betterment for Advisors, T. Rowe Price, Capital Preferences and Ryan Insurance Strategy Consultants have become Strategic Partners. These partnerships, which are one-year in length, are reserved for companies that desire an affiliation with FPA and are working with the association on a specific program or initiative that benefits members and chapters.

"I work closely with FPA because I owe my entire insurance career to the ongoing success of the financial planning community, so designing unique group insurance benefit plans for FPA members that have meant so much to me over the last 38 years was only logical. FPA leaders have always inspired me with their support of the products and services we provide and the care and concern they have when making sure members receive terrific value in their affiliation. I am proud to be a part of FPA's ongoing effort to advocate for and support the members while delivering best in class financial planning advice, tools, and resources for practitioners and their clients."

John Ryan, CFP®
Ryan Insurance Strategy Consultants
Greenwood Village, Colo.

2016 Partners and Sponsors

FPA would like to thank and recognize all companies that supported the association in 2016. Their contributions made much of FPA's programming and events possible.

FPA Annual Conference – BE Baltimore 2016

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- USCF
- Utah Educational Savings Plan
- Vanguard Annuity Advisor Services
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2016 FPA NexGen® Gathering

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2016 OneFPA Chapter Leaders Conference

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2016 Research Partners

Is Your Data Safe? The 2016 Financial Adviser Cybersecurity Assessment
- TD Ameritrade Institutional

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- MONEY College Planner™
- MoneyGuidePro
- My Virtual COO
- NAPA Premier
- National Purchasing Partners
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- SBA Loan Group
- Seasons of Advice®
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- Succession Link
- SS&C Advent
- Staples
- TriNet
- TWAMS Financial Planning
- Twenty Over Ten
- Verizon
- Veterinary Pet Insurance
- Wine Country Gift Baskets
- Yourefolio

The Consolidated Statement of Financial Position and Statement of Activities presented to the right are for FPA's fiscal year beginning June 1, 2015, ending May 31, 2016.

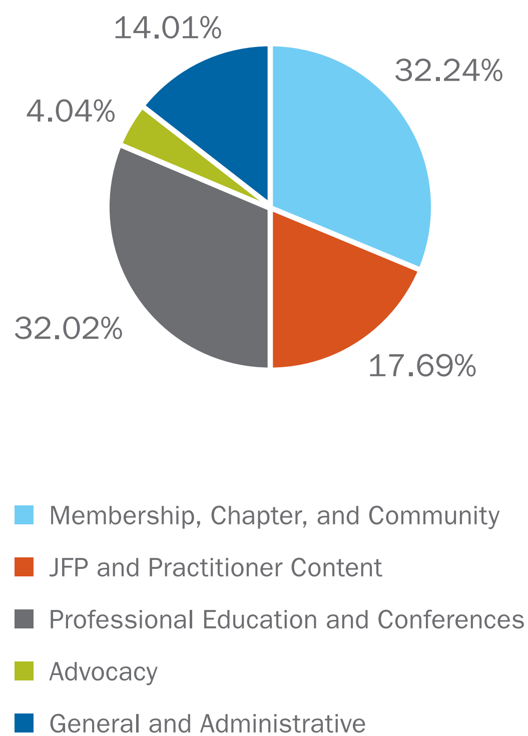
Consolidated Statement of Financial Position

		May 31, 2016
ASSETS:		
Cash and cash equivalents	$	2,682,181
Accounts receivable - net		496,783
Prepaid expenses and other assets		554,625
Property and equipment - net		913,856
Long term investments		2,878,308
Total Assets	$	7,525,753
LIABILITIES AND NET ASSETS:		
Accounts payable and accrued expenses	$	712,929
Deferred revenues, current		4,434,720
Deferred revenues, long term		77,595
Total Liabilities		5,225,244
Unrestricted Net Assets		2,300,509
Total Liabilities and Net Assets	$	7,525,753

Consolidated Statement of Financial Position

		May 31, 2016
REVENUES:		
Membership dues (net)	$	6,372,654
Event registration		1,308,705
Sponsorship		1,099,562
Fees		769,963
Advertising		531,304
Rental income		136,402
Royalties and other income		272,026
Total Revenues		10,490,616
EXPENSES:		
Program Services		8,038,440
Supporting Activity		2,698,090
Total Expenses		10,736,530
Change in Net Assets		(245,914)
Net Assets, Beginning of Year		2,546,423
Net Assets, End of Year	$	2,300,509

Total Expenses Summarized by Program








FPA®
FINANCIAL PLANNING ASSOCIATION

2016 Annual Report of the Financial Planning Association

Building a Community, Advancing the Profession

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