



It is bittersweet as I pen my last newsletter as President of the FPA NCA. As I look back at a year of challenges with virtual events, live events, back to virtual and live again, I am grateful for all that supported our chapter. Our Sponsors and membership continued to show why this chapter is so resilient and great, and I look forward to 2022 with great optimism and wish you Happy Holidays and prosperity.

We held our Annual Membership meeting in person at Westwood CC with close to 60 in attendance on Thursday, December 9. We recognized the 2021 Board and Kirk Taylor as the 2022 President and his Board for the coming year. It was an honor to work with this year's Board and I look forward to 2022 and the continued growth of our chapter.

We had two great speakers at Thursday's event, Victor Rohe a Platinum Sponsor with MFS gave us a deep dive on Crypto and Lisa Kirchenbauer discussed -How to become an Intentional Business owner. If you missed it, you can find handouts for both presentations on our Events page. It was great to see so many familiar faces and the buzz in the room as members networked and shared. We used our color dot system to allow attendees to identify their comfort level on socializing, see image below. We will continue to use this system at our live events and found it worked well. We hope to see more of you at our live events in the months to come.

Our new website is up and running, please bookmark the new site, the URL is a good bit longer and our prior site has been archived. The new URL is <https://www.financialplanningassociation.org/chapter/fpa-national-capital-area>

Upcoming Events:

We will kick off our January events with virtual Ethics from 2:30-5:00 on January 13.

Our annual Winter Symposium will be back in person on January 24, 2022 at a new location, the Westin Tysons Hotel. We hope you can join us for a great program, and we will recognize [Peggy](#) for her 24 years of outstanding work with the Association and welcome Kristin Beane, our new Executive Director. We hope you can join as we say goodbye and Happy Retirement to Peggy, she has been instrumental in our chapter success over the past 24 years. You still have time to lock in the early bird rate if you register before December 15, 2021. Parker Trasborg has put together a great program with 8 CFP and CIMA CEs approved.

Stay tuned as the Programs committee finalizes details for the February meeting.

You can register for the events at: <https://www.financialplanningassociation.org/chapter/fpa-national-capital-area>

Volunteer Opportunities:

If you are considering getting more involved, we announced committee opportunities at our Annual Membership. This is a great way to learn more about the Board positions and meet more members. The following committee opportunities are available:

- Membership
- Social & Golf
- Pro-bono

If interested please email Peggy and she will connect you with the committee Chair.

Next Generation:

The NexGen team held a virtual Forum on December 7 and will add more dates for in person soon. Check the website for dates and updates.

Diversity & Inclusion:

There are some exciting opportunities if you are looking to learn more or get involved. FPA National has a list of Knowledge Circles and opportunities to discuss and learn more.

Circles: These knowledge circles can be joined [here](#)

FPA National Updates:

FPA Announced on November 18 the Annual Retreat will be in-person on April 25-28, 2022 in Lost Pine, TX. You can click here to learn more and Register [FPA Annual Retreat](#)

There are two Knowledge Circles coming up next week, see below for details and link to register:

- 12/14/2021- Business Success Knowledge Circle: Learn the What, Why and How of Building (and transitioning) a 'Life Centered' Financial Planning Practice.
- 12/16/2021- Tax & Estate Planning: Utilizing Life Insurance for Advanced Estate Planning

Register for these great programs here: <https://fpalearning.onefpa.org/knowledge-circles>

Thank you again for your support this challenging year. I look forward to seeing you in coming months at events and if we have not met before, please introduce yourself- I would love to connect.

Best wishes,

Rose

Rose Price, CFP®

2021 FPA NCA President

