FPA THE FINANCIAL PLANNING ASSOCIATION

The **DFW Planner**

DALLAS/FORT WORTH JANUARY/FEBRUARY 2012

FPA Meetings & Special Events

2012 Chapter Meetings Dallas

February 3

March 6

June 12

September 18

November 13

2012 Chapter Meetings Fort Worth

June 26

October 16

Special Events

FPA DFW Career Day

February 3

New Member Breakfast

March 20

FPA DFW Rangers Ballpark Event

April 6

FPA DFW Financial Planning Symposium

May 24

You Make the Difference

FPA FINANCIAL PLANNING ASSOCIATION OF DALLAS/FORT WORTH

The Heart of Financial Planning™

Letter from the 2012 FPA DFW President

2011 was a wild ride. Huge market swings. Legislative grid lock. Natural disasters. And yet we continue to find ways to move forward with FPA of DFW because of all the good work each and every one of you do. Your Chapter made good progress in 2011 and expect to make even better progress in 2012.

Our Career Day is a model for chapters around the country to follow. Our "Day at the Capitol" was a success and we are looking for better ways to influence our legislators in the coming session by bringing the message of FPA and the significant resource we can be to them. Our Technology achievements are the talk of the FPA chapters around the country. We continue to attract Corporate Partners to help us defray the costs of operating the Chapter. I strongly encourage you to take the call from a Corporate Partner, when they call. It is because of their interest and funding we can do many of the great events at a reduced cost to you, the member.

Our theme for 2012 is **"You Make the Difference".** It is with the combined efforts of your Board Members, Executive Director and you the membership that we can take DFW FPA to the next level. You do make a difference in the professional outcome of the FPA, in your personal life and the lives you touch.

It is our goal in 2012 to double the attendance at our meetings. This can only be achieved if each of you commit to bringing one guest to each meeting. Ask your CPA, your banker, your attorney, your mortgage broker. Open your database. Ask anyone you feel would find benefit in being connected to the FPA. Once they attend a meeting, maybe they will want to become a member. Committee involvement is one of the best ways to give back to the financial planning community.

We look to you for help in stepping up and joining a committee in 2012. We have a committee that will suit your needs and passion. You can commit as little or as much time as your schedule allows. We will find a place for you to make a difference. Just ask!

I wish you the best for 2012.

Sincerely,

Cliff Layfield, CIC, ARM
2012 FPA DFW President

FPA DFW Chapter Meeting & Career Day

A Global Perspective the Eurozone & Sovereign Debt

Stephen S. Waddell, Senior Vice President
Brandywine Global Investment Management, LLC

and

IRA Distribution and Rollovers - Integrating Estate Planning & Income Tax Planning

Christopher R. Hoyt - Professor of Law
University of Missouri (Kansas City) School of Law

February 3, 2012

Crowne Plaza Hotel
Addison, TX

Register Online
www.fpadfw.org

Register Online

See pages 2 - 4 for details on the chapter meeting, career day events and the 3rd annual mentorship program.

FPA Dallas/Fort Worth Chapter Meeting & Career Day

Friday, February 3, 2012 I Chapter Meeting Registration 10:30 I Chapter Meeting Program 11:00 - 2:00
Crowne Plaza Hotel I 14315 Midway Road I Addison TX 75001

February 3 Event Schedule

8:30 -10:50	Career Day Scheduled Interviews ***PLUS**: Designated Networking Area w/ Continental Breakfast!*
10:30	Chapter Meeting Registration Open
11:00	FPA DFW Chapter Meeting Welcome & Announcements
11:20	A Global Perspective the Eurozone & Sovereign Debt
12:10	Break
12:30	Announcements I Luncheon
12:50	Corporate Partner Spotlight (pending)
1:00	IRA Distributions & Rollovers
2:00 - 4:15	*"Career Day Roundtable Event" - Lobby Bar*
4:15	*Networking Happy Hour—Lobby Bar*

(Career Day pre-scheduled interviews will be held from 2:00 - 4:30)

CE Credits: 2 CFP, 2 CPA CE

Register for the FPA Dallas/ Fort Worth Meeting at:
www.fpadfw.org

Chapter meeting questions:
execdir@fpadfw.org

2012 Event Fees:

FPA Members	$35
Guests/Non Members	$60

$5 surcharge applies to at the door registrations

See page 3 for details on the 9th Annual FPA DFW Career Day. **Also, join FPA for a Roundtable Event and Happy Hour following the chapter meeting**

Feature Topics & Speakers

A Global Perspective the Eurozone & Sovereign Debt

Stephen S. Waddell, Senior Vice President
Brandywine Global Investment Management, LLC

The Global Bond market has been at the front of everyone's consciousness this past year. What happened? We will explore the explosion in sovereign debt. We will look at the Euro in particular, but will also look at the implications for other currencies and other debt markets including the US debt yield curve. Has it happened before? Yes, and we look at some historical data of the previous crises. What were the solutions for the previous debt crises? There have been different policy responses. Some worked better than others and we will look at how the Euro can recover and some of the steps that are being taken by the different members of the Euro. How can you position your clients to take advantage of the changes in the world debt markets? We will look at the performance of the various debt markets and some scenarios for the coming year.

Stephen S. Waddell, Senior Vice President As a Wealth Management Group marketing professional, Steve is responsible for new business development and diversified financial service firm relationships in the West and Southwest regions. He joined the Firm in 2002. Previously, Steve was vice president of the Western Region for Aberdeen Asset Management (1996-2002), and regional director for Furman Selz Capital Management (1991-1995). He also sold investments for Cigna Group Pension (1989-1991) and Union Central Pensions (1986-1989). Additionally, he served as a wholesaler for E.F. Hutton & Co. (1984-1986), and was a drilling engineer for Chevron USA (1979-1984). Steve earned a B.S in Petroleum & Natural Gas Engineering from Pennsylvania State University.

IRA Distributions & Rollovers: Integrating Estate Planning & Income Tax Planning

Christopher R. Hoyt
Professor of Law
University of Missouri (Kansas City) School of Law

Following a review of the ground rules for required lifetime and testamentary distributions from retirement plans, this session will illustrate the impact that those rules have on different beneficiaries: elderly, younger, and youngest. In the case of an elderly surviving spouse, does portability provide the best of both worlds: estate tax benefits plus the income tax benefits of an IRA rollover to a surviving spouse? Is portability better than using an IRA to fund a credit shelter or QTIP trust? What about second marriages?

Christopher Hoyt is a Professor of Law at the University of Missouri Kansas City) School of Law where he teaches courses in the area of federal income taxation and business organizations. Professor Hoyt has served as the Chair of the American Bar Association's Committee on Charitable Organizations (Section of Trusts and Estates) and on the editorial board of Trusts and Estate magazine. He is an ACTEC fellow and was elected to the Estate Planning Hall of Fame by the National Association of Estate Planners & Councils.

9th ANNUAL FPA DFW

2012 CAREER DAY

Friday, February 3, 2012

8:30 AM – 5:00 PM

(The Chapter Meeting Will Be Held From 11:00 a.m. - 2:00 p.m.)

Crowne Plaza Hotel (972) 980-8877

14315 Midway Road, Addison, TX 75001

Our goal is to facilitate the interview and networking process between top financial planning students/ career changers and DFW area financial planning professionals.

"I have hired two people from FPA's Career Day and I struck gold both times!"
Mike Busch, CFP®, CPA, CEBS / Vogel Financial Advisors

"What makes the FPA DFW Career Day different from most Career Fairs is the personal attention that you receive. I attended the 2006 event and received two job offers and ended up taking one of them. I also learned a lot from the luncheon, speakers, and conversations with advisors." *Scott Wade / Vogel Financial Advisors*

Expanding your firm by hiring a new employee, whether for an internship or full-time position, is a difficult and time-consuming task. Determining the responsibilities for the new hire, establishing a career path for the individual, and the actual interviewing process can take months of planning and consideration.

The process is further complicated by the increasingly competitive hiring landscape, which is especially true in our rapidly growing profession. Perhaps the most difficult obstacles, from the business owner's perspective, are finding quality candidates, coordinating your schedule with theirs, and then allocating hours of precious time to actually interview them.

FPA DFW Career Day is designed to simplify this process for you!

The FPA DFW Career Development Committee is currently in the process of gathering resumes from students in some of the top financial planning programs in Texas and in the country.

Firms participating in Career Day will have access to the resumes and will choose up to 7 individuals to interview at the event, which will coincide with the FPA DFW Chapter Meeting on Friday, February 3, 2012. Interviewing firms will then provide the Career Development Committee with their selections and we will coordinate the scheduling process.

If you are interested in being an interviewing firm, or have questions, please contact Dennis Moore, FPA at **dennis.moore@questadvisor.com** or (214) 691-6090.

Register for Career Day online at www.fpadfw.org today!

FPA DFW Mentor Program 2012 Enrollment Now Open

Sign up for the 2012 FPA DFW Mentor Program!

The Mentor Program is entering its third year and we're off to a great start! Please help us continue this momentum by becoming a mentor or a mentee.

The goal of the Mentor Program is to bring together established planners and new planners in the Dallas/Fort Worth area, bridging the gap and providing a way to transfer knowledge, experience, and skills from one generation to the next, ensuring the continued growth and future success of DFW's financial planning profession.

By offering a mentorship program we want to deliver on our promise to be a community that fosters the value of financial planning and advances the financial planning profession. We are confident that our DFW members are the best at delivering this message, and we appreciate your help and support.

We'd like to encourage you to get involved with the program. It is beneficial for both the mentor and mentee. For those interested in becoming a mentor or mentee, please visit our website to complete an application.
Visit www.fpadfw.org
Click on "Members Area"
Click on "FPA Mentor Program"
Complete the online application that best fits your role (mentor/mentee)

Our goal is to have the mentor/mentee matches made by Career Day 2012, so submit your application today!

If you have any questions, please do not hesitate to contact us at CareerDevelopment@fpadfw.org.

We hope to hear from you soon and see you at the 2012 Career Day!

Sincerely,
FPA DFW Mentor Program Committee

Did you know...

You can post your job positions and help wanted ads on the FPA DFW website for free? And that you can review the resumes of career changes and student interns?
Visit www.FPADFW.org to learn more by clicking on:

- Job Bank
- Resume Resource Center
- Career Day Info & Resumes

2012 FPA DFW Season Tickets

ONE Price…ONE Payment…One Time a Year…

As a member of FPA you have the opportunity to purchase a Season Ticket. Purchasing the Season Ticket is a convenient method of prepaying for the upcoming season of chapter education programs sponsored monthly by the FPA of DFW. Approximately 20-25 CE credit hours can be earned throughout the year (January 1 - December 31, 2012). Pricing for the season tickets remains the same for the FIFTH year in a row. **Save up to $170** a year by purchasing a season ticket..

2012 Season Ticket Options

- FPA Professional Member Enhanced Package: $285 - BEST VALUE! (A savings of $170 if all 7 meetings are attended—Case study's are free for STH's) Season Ticket Package includes 7 chapter meetings (Dallas & Tarrant County meetings), all FPA Study Groups and admission to the FPA DFW Financial Planning Symposium in the Spring of 2012.

- FPA Professional Member Season Ticket: $150 (A savings of $130 if all 7 meetings are attended—Case study's are free for STH's) Season Ticket Package includes your 7 DFW chapter meetings and all FPA Study Groups (Dallas & Tarrant County)

Details and online order application available now at www.fpadfw.org

2011-2012 FPA DFW **Event Schedule**

Following are a few of the FPA DFW 2011 event dates - be sure to include these on your calendar! Additional events are in the works and will be announced throughout the year.

2012 Chapter Meetings (Dallas)

February 3

March 6

June 12

September 18

November 13

2012 Chapter Meetings (Fort Worth)

June 26

October 16

Special Events

FPA DFW Career Day

February 3

FPA DFW New Member Breakfast

March 20

FPA DFW Rangers Ballpark Event

April 6

FPA DFW Financial Planning Symposium

May 24 - Westin Galleria Dallas

Additional details to follow on:

- Allied Professional Networking Events
- FPA DFW Study Group Meetings
- National Financial Planning Week Events
- Tarrant County Chapter Meetings
- Intern Appreciation Event

Foundation for Financial Planning

The Mission of the Foundation for Financial Planning is to help people take control of their financial lives by connecting the financial planning community with people in need. We achieve this by supporting pro bono advice and outreach activities.

The Foundation helps bring national organizations together to provide FREE financial education and planning to underserved populations via **Financial Planning Days** throughout the U.S.

To learn more about the Foundation for Financial Planning or how you can contribute, visit its website at www.foundation-finplan.org or call 770-938-1110 - **Jim Peniston**, Executive Director

FOUNDATION FOR FINANCIAL PLANNING

Classified Ad

Office Space: We have at least one office to sublet. It is roughly 180 square feet (15'9"x11'6"). We might also make another office available and it is roughly 195 square feet (15"x13'). The lease rate will be based on our overall lease rate of $18.50/sf plus expenses.

Contact: Jimmy Perryman
Perryman Financial Advisory
972-770-4800 - jperryman@billperryman.com

Do 1 Thing.
One Thing Leads to Another.

FPA-PAC

Representing financial planners and issues affecting planner practices are primary objectives of the Financial Planning Association. To enhance our efforts, the FPA-PAC was created as the federally registered political action committee of FPA, the only registered PAC on Capitol Hill representing the interests of the financial planning profession.

By contributing to the FPA-PAC fund, you're helping support candidates for the United States Senate and House of Representatives — primarily incumbents, regardless of political party — who have demonstrated previous support of issues FPA believes critical to advancing the profession.

To contribute visit: https://www.fpanet.org/DomainServices/PACContributions/Contribute.aspx

Spotlight on Member Discounts

Give back, get back! Save money on FPA Dues!!! Hurry, as this offer ends soon!!

Want to give back to FPA, but have no time for a major commitment right now? (This is the easy part!)
Do you have friends or colleagues in the industry you have been meaning to call? (This is the fun part!) Do you like to save money? (Dumb question!)

The life blood of any organization is its members. To stay healthy, relevant and timely, one of the most significant things you can do is introduce a friend or colleague to FPA.

Introduce a new member to FPA, **and our DFW chapter will send you a check for $25 (first 75 new DFW members).**

Please send the name of your referral to: membership@fpadfw.org to make sure you get credit for your referral.

For detailed information visit: www.fpanet.org/professionals/Membership/ReferaColleague/

Welcome New Members

John Albert
First Command Financial Services

Vaughn Badenhorst
First Command Financial Services

Danny Boyce
Lee Financial Corporation

Denis Burns, CPA, MS
Bland Garvy Eads Medlock Deppe, PC

Charles Dix
Wells Fargo Advisors

Sergio Garcia, CFP®, CRC®
The Gardner Group

Scott Hammel, CFP®
Atlas Wealth Advisors

Meredith Lee
Lee Financial Corporation

Robert Rice, Jr.
First Command Financial Services

Nona Rosa
HD Vest Financial Services

Helen Stephens, CFP®, EA
Helen Stephens Group, LLC

Dennis Wigant
Wigant & Associates

John Wells
Fidelity Investments

Are YOU Interested in Shaping the Future of FPA DFW?

2012 Committee Position Opportunities

The FPA of DFW Board sets a vision for our association, positions FPA at the heart of financial planning and contributes to building the profession. You can participate in this important process and shape the future of FPA and financial planning by volunteering to be on a board committee in 2012. Committee members are called up to think strategically, engage in flexible, ongoing dialogue openly, work collaboratively, and advance FPA's primary aim by exercising vision and stewardship for the benefit of FPA DFW.

If you are passionate about the future of financial planning and can help shape FPA please contact the FPA DFW office at 972-747-0407 or execdir@fpadfw.org for more information. We look forward to your participation!

Defining success is a difficult task. Most people equate it with wealth, power, and happiness. However, true success is not a thing you acquire or achieve. Rather, it is a journey you take your whole life long.

Greater Dallas Business Ethics Awards

The Greater Dallas Business Ethics Award committee is pleased to announce that the 2012 Greater Dallas Business Ethics Awards will be held on **May 3, 2012** at the Westin Galleria Hotel. The committee looks forward to receiving nominations and submissions through the submission deadline of February 2012. For a copy of relevant award forms, see www.gdbea.org and click on Nomination/Entry.

GDBEA.org

FPA MEMBER BRING A GUEST PROGRAM

Don't know anyone at the meetings?

Invite someone you do know to experience with you the premiere education, networking and continuing education program in the Metroplex for those people who are serious about financial planning. The Dallas Ft Worth chapter of the FPA is all about enabling financial professionals to become better at what they do and have some fun at the same time. Take some time out of your stressful harried schedule to refuel and reinvigorate your practice.

To show how serious we take engaging serious planners we are offering a way for you to bring your friend or co worker to experience the FPA . We are starting a new program this year which allows each member to invite an individual to experience for free one of our regular program lunches. **Each free attendee may only utilize this program once during the year.**

In these tough economic times the Dallas Ft Worth chapter of the FPA has not pulled back or shrunk in size but is looking to engage more financial planning professionals in an ongoing dialogue.

So much has happened and continues to impact us a profession. Stay current where it matters. Find ways to be better at what you do and make a difference for your clients.

Come grow with us this year.

Terms & Details:

- Each free attendee/guest may only utilize this program once during the year
- You must sign up your guest when you register for the event
- Members will be billed $50 for any guest that does not show – please confirm with your guest that they can attend before signing them up

Share Your Passion for Excellence at www.GrowFPA.com

As a member of FPA, you are committed to helping create a world where everyone thrives and prospers.

You know the important role FPA membership plays in your success. Give that gift to your colleagues while helping us grow the FPA community.

www.GrowFPA.com

FINANCIAL PLANNING ASSOCIATION OF DALLAS/FORT WORTH

The Heart of Financial Planning™

There are many benefits to membership and active participation. Like most organizations, you get out of your membership what you put into it. Make the most of your membership with these Dallas/Fort Worth Chapter benefits:

- Acquire CFP, CPA & TDI CE Credits
- Enjoy networking opportunities with other professionals
- Newsletter updates on meetings, chapter activities, legislative and regulatory issues
- Public awareness through the Symposium, Best Prep, Junior Achievement, CFA, SFSP, CLI, and CPA events and conferences
- Learn about the most current products, strategies, and markets in the financial planning profession

Find FPA DFW on Facebook, LinkedIn & Twitter

Did you know FPA of DFW has a presence on the three most popular social networking sites? We have profiles on Facebook, Twitter, and LinkedIn, providing members multiple ways to keep up to date on the various activities of the local chapter. Follow just one or all three, it's your choice!

Get involved and help us spread awareness of FPA DFW and our great mission to your colleagues and fellow FPA members.

Click here to join the Financial Planning Association of Dallas/ Fort Worth group on LinkedIn.

Click here to follow the FPA DFW Twitter profile.

Click here to join the FPA DFW Facebook group.

THANK YOU to our FPA DFW 2011 Corporate Partners

PLATINUM

Cole Real Estate Investments
2012 FPA DFW Double Platinum Partner

Trust Company of America – RIA Technology & Custody

Chubb

U.S. Global Investors

Schroders

Payden Mutual Funds

Montage Investments

DundeeWealth

GOLD

American Century Investments®

Artio Global Investors

HUB International Personal Insurance

Willis

Nationwide Financial

SEI New ways. New answers.®

SILVER

Thornburg Investments®

William Blair & Company®

Rice – Susanne M. Glasscock School of Continuing Studies

American Beacon Advisors

Charles Schwab Advisor Services

MFS Investment Management – Choose What Fits.®

Jensen Investment Management®

TD Ameritrade Institutional

Did you know...?

It's probably not love that makes the world go around, but rather those mutually supportive alliances through which partners recognize their dependence on each other for the achievement of shared and private goals. Fred A. Allen

Did you know...?

Our annual partners provide approximately fifty percent of the revenue needed to run the chapter? Without our Partners' support, your price for chapter meetings and the annual symposium would be much higher. Plus, we would not have the support of Melisa Hall and the administrative office.

When a Partner communicates with you, please take a few minutes out of your day to thank them and listen to what they have to offer.

Do 1 Thing. One Thing Leads to Another.

Laura Biesemeyer
2011 FPA DFW
Corporate Partnership Director
(972) 884-6156

Happy Anniversary

Congratulations to the following Dallas/Fort Worth Chapter members who are celebrating significant FPA Membership Anniversaries in...

January & February

25 Years

Jan Mohamed, CFP®
ConfidentVision

5 Years

Stephen Blum, CFP®, CLU, ChFC
Strategic Wealth Planning

Julia Eubanks, CFP®
First Command Financial Planning

Tam Tran-Minh, CFP®
Fidelity Investments

Guy Allert
Allert Wealth Management

Allison Geiger, CFP®
Howard Financial Services

David Sego, CFP®
Weaver Wealth Management

Julie Rosenthal
Rosenthal Retirement Planning, LP

H. Dan Farrell, CFP®, CPA/PFS
Farrell Financial Advisory Services

Tankhoa Coligado
Mentor Financial Advisory Group, Ltd

10 Years

Chris Troseth, CFP®
Investors Asset Management, Inc.

Sue Spellman, CFP®
Carter Financial Management

Caleb Brown, CFP®
New Planner Recruiting, LLC

Timothy Hutton, LUTCF
Hutton Financial Advisors

Eric Sawyer, CFP®
Peacefield Wealth Solutions, LLC

Paul Thompson, CFP®
Signal Securities, Inc.

Richard Bond
Verizon Communications

George Alden, CFP®, ChFC, MSFS
Eagle Strategies, Inc.

FPA. Financial Planning Association

FPA Dallas/Fort Worth
P.O. Box 261750, Plano, Texas 75026-1750

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fax: 972.747.0409
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Plano, TX 75026-1690
Phone: 972.747.0407
Fax: 972.747.0409
Email: execdir@fpadfw.org
Website: www.fpahdfw.org

The DFW Planner is a bi-monthly publication. The DFW Planner provides information, resources and networking opportunities to the membership of FPA DFW and the community.

Comments or submissions can be made to the FPA DFW Executive Director at 972-747-0407 or execdir@fpadfw.org.

An Update from Your Pro Bono Committee

Dusty Wallace, J.D., CFP®

FPA DFW Pro Bono Directfor

FPA DFW Pro-Bono 2011 Goal:

Our 2011 goal to reach **500** people in our community with **500** volunteer hours was met and exceeded. We are excited to announce that we reached **708** people in our community with **34** volunteers and **555** hours volunteered!

FPA DFW Pro-Bono 2012 Goal: Same as 2011. Let's reach another 500 people with 500 volunteer hours. Better yet, let's exceed what we accomplished in 2011!

Calling All Volunteers: I am so proud of what our chapter members accomplished in 2011! If you didn't volunteer in 2011, now is the time to get involved! Let's show the other chapters and our community what we have to give. If you would like to get involved with one of the opportunities listed below, please send me an email at probono@fpadfw.org or complete a Pro Bono Commitment Card at the next FPA meeting.

- Junior Achievement – time commitment usually 6-8 hours total depending on the course you are teaching. Can teach in fall and in the spring. Materials provided
  To inspire and prepare young people to succeed in a global economy.
- Library Day – time commitment is flexible. It is a one day event at a Dallas area library with various financial planning topics presented to the community.
- Speaking opportunities
  As they become available are emailed around to the pro bono yahoo group
- One-on-one financial planning – time commitment varies per individual. Software (money 101) is available to help with this
  - Through Dallas Morning News
  - Wounded Warrior - To raise awareness and enlist the public's aid for the needs of injured service members. To help injured service members aid and assist each other. To provide unique, direct programs and services to meet the needs of injured service members. Basically a complete rehabilitative effort to assist warriors as they recover and transition back to back to civilian life.
  - YWCA - Is an organization whose purpose is to help improve women's lives and remove barriers to self-sufficiency. This is a quarterly meeting held at a YWCA location where you spend an hour to two hours providing one-on-one planning to graduates of their financial program.

Volunteer Hours: If you have completed volunteer hours during 2011, please be sure to report them to Dusty Wallace at probono@fpadfw.org.

Recognition: I wanted to especially thank the Pro Bono Chairs for all the help and support they have provided throughout 2011. They have spent time personally volunteering in our efforts, worked hard to nurture and maintain our current pro bono partnerships, and have done an exceptional job in their efforts for 2011. So, a BIG thank you to…

Lacey Garcia, Chair of YWCA and Boys & Girls Club,
Melissa Cox, Chair of Financial Freedom,
Lance Alston, Chair of FPA Library Day,
Mona Young, Chair of VITA, and
Jaime Boyles, Chair of Junior Achievement

(Continued on page 11)

FPA Pro Bono Update

And of course, we couldn't make it happen without our volunteers. Our committed 2011 volunteers have made a difference in several people's lives. So a special thank you to:

Meredith Clinton	**Mimi Lee**
Ray Fitzgerald	**Dennis Carpenter**
Sergio Garcia	**Ashley Parks**
Michi Joseff	**Dan Mauck**
Jean Keener	**Claudia King**
Devonee Kershner	**Tiffany Garza**
Laura Mentemeyer	**Jeffrey Miller**
Lawerence Reid	**Frannie Gardner**
Brian Russell	**Laura Biesemeyer**
Jeff Schmeltekopf	**Laura Cordell**
Gay Sommer	**Todd Amacher**
Gelasia Steed	**Jesse Anderson**
Hanna Westby	**Neil Krishnaswamy**
Sandy Anderson	**John Williams**
Victor Garza	**Andrew Gould**
Katie Haynes	

If I missed a volunteer on this list, please immediately email me to let me know! I would also like to introduce you to the **2012 FPA DFW Pro Bono Committee.**

Lacey Garcia, Chair of YWCA and Boys & Girls Club,
Melissa Cox, Chair of Financial Freedom,
Benjamin Briggs, Chair of FPA Library Day,
Jaime Boyles, Chair of Junior Achievement
Mona Young, and **Randall Higgens**

Looking forward to a GREAT 2012!
Dusty D. Wallace, CFP®, JD, DFW FPA Pro Bono Director

FPA DFW 10th Annual Media Training

Coming in February

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The FPA receives over 200 media inquiries every year! We get them from the Wall Street Journal, Dow Jones, Reuters, Investment News, CNN, Money Magazine, Fortune, The Journal of Financial Planning and the Dallas Morning News to name a few!

Get trained on how to do effective interviews with the media, media resources and outlets available to you, and much more! Hear from your colleagues and peers within the industry about their successes and challenges in working with the media. This session will be full of information you will not want to miss!

If you are a CFP® licensee and you are interested in fielding questions from the media, this is an event you will not want to miss! Space is limited so please reserve your spot now! You must attend Media Training **at least once every two years** to be eligible to receive referrals to these inquiries through FPA DFW.

Questions??? Contact the FPA DFW office @ 972-747-0407 or e-mail: execdir@fpadfw.org
Or your Public Relations Director: Crystal Hawkins, CFP® @ 214-637-9513; Crystal.Hawkins@Mycfo4life.com

DETAILS & REGISTRATION will soon be posted @ www.FPADFW.org
You must be a CFP® Licensee to attend Media Training Day

NEW SEMINAR SERIES
"You're A Financial Planner: Now What?"

This new seminar series is designed for early career planners with 0 to 5 years of experience, but all are welcome. It will be presented each month on the second Tuesday evening of the month at 6:30 p.m.

Each month's seminar will cover a different topic(s) of interest to new planners such as: Starting and building a practice; financial planning tools; survey of business models; creating business plans; study groups; art vs. science; survey of jurisdictions and fee/commission models, books of interest, etc.
Each month's seminar will cover a different topic(s) of interest to new planners such as: Starting and building a practice; financial planning tools; survey of business models; creating business plans; study groups; art vs. science; survey of jurisdictions and fee/commission models; best books to read; and many more topics!

Join us, along with your financial planning colleagues to kick off this new and exciting series to help make the first phase of your new career a success!

1st Topic:	"Starting and Building a Financial Planning Practice" (*What I did right and more importantly, what I did wrong*).
Speaker:	Patrick Dougherty, CFP®, MBA
Date:	February 14th, 2011
Time:	6:30 – 8:00 p.m.
Location:	Weaver Wealth Management Three Forest Plaza 12221 Merit Drive, 12th Floor Dallas, Texas 75251

Join the FPA DFW Symposium Committee

Do you have a passion for event planning? Are you looking for a way to give back to FPA DFW? If so, we need you! We are currently looking for committee members for the Special Events Committee to help with planning for the 2012 FPA DFW Financial Planning Symposium. Committee meetings will begin this Fall to prepare for the May 2012 event.

If you are interested in serving on this committee contact our Special Events Director, Jarrod Upton at **jarrod@iaminvest.com** or (972) 985-7162.

2012 FPA DFW
Financial Planning Symposium



May 24, 2012
Westin Galleria Dallas

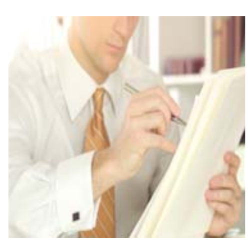
Plan to attend the 12th Annual FPA DFW Financial Planning Symposium on Thursday, May 24th at our new location, the Frisco Westin Galleria Dallas, where we will explore all aspects and areas of financial planning. This conference is an exciting opportunity to hear from nationally renowned speakers and enjoy a day of learning, networking and mentoring. In addition to a great agenda and outstanding speakers, this year's event will also feature the return of the exhibitor's area, giveaways and much more!

At this conference planners and advisers will receive the practical guidance you need to develop the most effective planning strategies for your clients. Explore the latest planning tools, their uses and their nuances. Learn how to help your clients incorporate the right mix of planning vehicles, achieve specific financial objectives and understand the underlying methodology.

Early Bird Pricing Will Begin in Feb

Complete details available online soon
@ www.FPADFW.org

March/April 2012
FPA DFW Newsletter



If you have an article, advertisement or notice for the 2012 March/April issue of the FPA DFW Newsletter, submit it to Melisa Hall at execdir@fpadfw.org by February 15, 2012.

2012 FPA of DFW Board of Directors Elected

The slate of candidates proposed to serve as the officers and directors of the Financial Planning Association of DFW for 2012 was recently elected by the chapter members as follows.

FPA of DFW wishes to thank each of these individuals for their willingness to serve our organization and wish them well as they assume their roles in 2012. For a complete listing of 2012 FPA DFW Officers & Directors please visit the chapter website at www.FPADFW.org and click on ‘Leadership’.

Chairman/Past President
Monte C. Ferguson, CFP®, ChFC
Pivotal Financial Advisors, LLC

President
Cliff Layfield, CIC, ARM
Willis Personal Lines

President Elect
Dan Mauck, CFP®
Clintsman Financial Planning

Treasurer
Christina Williams, CFP®
Lee Financial Corporation

Secretary
Roy Gray, CFP®
Munn & Morris Financial Advisors, Inc.

Membership Director
Parker Consaul, CFA
Pivotal Financial Advisors, LLC

Government Relations Director
Sarah Henze, CFP®
Lee Financial Corporation

Education/Programs Director
Jonathan Meaney, CFP®
Carter Financial Management

Corporate Partnership Director
Laura Biesemeyer
Summit Alliance Financial

Pro Bono Director
Dusty Wallace, J.D., CFP®
Lee Financial Corporation

Technology Director
Kane Vines, CFP®, CRPC
Ameriprise Financial

Public Relations Director
Crystal Hawkins, CFP®
CFO4Life, LP

Special Events Director
Jarrod Upton, CFP®, MBA, MS
Investors Asset Management

Allied Professionals Director
Rett Dean, CFP®, EA, CFS, RFC
Riverchase Financial Planning

Career Development Director
Dennis Moore, CFP®
Quest Capital Management

Save the Date!

11th Annual FPA DFW Ballpark Event
April 6, 2012

Rangers *vs* White Sox
Texas Rangers Stadium—Arlington TX
Bullpen Suite

Space is extremely limited and this event will sell out quickly. Registration will open in mid-February. Look for details to come soon.
www.fpadfw.org

An great educational topic will start the day off. The afternoon will be filled with a great view of the pre-game activities and a full lunch buffet followed by great Texas Rangers baseball in the Bullpen Suite! Opening pitch at 1:05 pm

Save the date and join us on April 6 to watch the 2010/2011 World Series Rangers on opening day of the 2012 season!

Texas Rangers Baseball

THE HEART OF FINANCIAL PLANNING:
The community that brings together those who deliver, support and benefit from financial planning.