



FINANCIAL  
PLANNING  
ASSOCIATION  
OF GREATER PHOENIX



# 2020 Professional Development Showcase

**Tuesday, September 29, 2020**  
**8:30 am to 6:00 pm**

A Robust Online Conference | Experiential Learning

<https://www.fpaofphoenix.org/event-3397477>





# Thank You!



# Welcome

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**“Progress is impossible without change, and those who cannot change their minds cannot change anything.”**

*George Bernard Shaw*

FPA of Greater Phoenix embraced change in 2015, and the last five years produced some exceptional learning and new tools for our chapter, our planners, and ultimately our profession.

As it turns out, life is forcing incredible amounts of change on everyone this year.

We are as ready as it is humanly possible to be ready for this turmoil and disruption.

Showcase provides our team an opportunity to share with our fellow planners some of the work and tools that provide a strong foundation.

“Working with ACF has been one of the true highlights of my 38 years in the investment industry.”

**James P. Marten, CIMA**

Global Institutional Consultant, Wealth Management Advisor, Merrill Lynch



**At the Arizona Community Foundation, we partner with professional advisors across the state to provide personal service and helpful resources to meet their clients' charitable goals. Services we offer to our partners and their clients include:**

### **Investment management.**

Clients may continue to work with their existing professional advisor, depending on fund balance, to manage the investment of assets held in ACF funds.

### **Maximizing tax benefits.**

As the charitable arm of your clients' team of advisors, we partner with you to develop customized charitable planning goals that take advantage of available tax benefits.

### **Local connections.**

Our six affiliate offices across the state provide local resources to help clients identify nonprofit organizations that align with their charitable goals and interests.

### **Education events.**

ACF hosts convenings on relevant topics for your clients and educational seminars for professional advisors.

### **Donor advised funds.**

Clients take advantage of available tax deductions when they contribute cash, stock, or appreciated assets to their funds.

### **Dedicated support.**

Clients have access to dedicated relationship managers who provide personalized philanthropic services.



ARIZONA  
COMMUNITY  
FOUNDATION

Our network of professional advisor partners is always growing. If you're interested in connecting with us, give us a call at **602.682.2087** or email Lisa Stratton at **LStratton@azfoundation.org**.

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**FPA of Greater Phoenix and  
Ashton Thomas Private Wealth are  
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our community and the  
profession of Financial Planning.**

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# Program Lineup

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## Morning Workshops

Brand Strategy Development Case Study: FPA of Greater Phoenix  
**Murray Smith**

An Introduction to Dynamic Governance  
**Melissa Kemp**

## Lunch Talk (45 minutes)

Dialogue and Review by  
Matthew Jarvis and Micah Shilansky

## Afternoon Workshops

The Freedom to be Yourself = 10x Success\*  
**Colleen Hallinan**

Advocacy in Action  
**Matthew Benson**

## Social/Mixer

Hosted  
Matthew Jarvis and Micah Shilansky

*\* Individuals attending this workshop will be grouped with other planners to make teams. All workshop attendees must take/report their Kolbe A indicators on or before September 22, 2020.*

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## *Changing how the world thinks about investing*

For more than 30 years, Dimensional has been working closely with financial professionals who share our commitment to delivering a better investment experience. Together, we've seen how client-focused advice combined with investment solutions based on the leading financial science can help people enjoy the long-term benefits of the capital markets.

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There is no guarantee strategies will be successful. Dimensional Fund Advisors LP was founded in 1981.

"Dimensional" refers to the Dimensional separate but affiliated entities generally, rather than to one particular entity. These entities are Dimensional Fund Advisors LP, Dimensional Fund Advisors Ltd., DFA Australia Limited, Dimensional Fund Advisors Canada ULC, Dimensional Fund Advisors Pte. Ltd., Dimensional Ireland Limited, Dimensional Japan Ltd., and Dimensional Hong Kong Limited. Dimensional Hong Kong Limited is licensed by the Securities and Futures Commission to conduct Type 1 (dealing in securities) regulated activities only and does not provide asset management services.



# What is Whova?

The 2020 Professional Development Showcase is being brought to you via WhoVA, an innovative virtual conference platform designed to function—and feel—almost like an in-person event.

For conference attendees, Whova offers:

### Amazing Engagement Opportunities, just like Face-to-Face Conferences

Experience live polls, session Q&A, surveys, session feedback, discussion boards, and more

### Maximized Virtual Networking Opportunities and Community Building

Make new connections with attendee profiles, match-making, icebreaking, and virtual meet-ups

Private chats foster deeper connection

Active community board provides opportunities for discussions, photo sharing, tip giving, etc.

Virtual business card exchange enables future communication

### Easy Accessibility from Any Device

Use your phone, tablet or laptops... anywhere anytime

### Fun Facts from other Whova events:

**277,649**

messages were posted on one event's Community Board!

**537**

meet-ups were organized by attendees themselves during an event!

**283**

one-on-one meetings were scheduled at a single event!

**2,729**

Photos were shared at one event.

LEARN MORE AT [www.whova.com](http://www.whova.com)



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BeachFleischman PC  
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profession of Financial Planning.**

**[www.beachfleischman.com](http://www.beachfleischman.com)**



**Matthew  
Jarvis**



**Micah  
Shilansky**

## Your Showcase Hosts

Drawing on our experience of growing our own highly successful practices, we show financial advisors how to deliver massive value to their clients, achieve unprecedented profitability, and spend more time with the ones they love.

**We help financial advisors build  
The Perfect RIA.**

**Matthew Jarvis** and **Micah Shilansky**, founders of **The Perfect RIA**, will be guiding our **Lunch Talk**, 30 minutes of review and dialogue about the morning workshops, Partner PEP talks, their take on the Whova conference platform, and tidbits they picked up that they want to explore further or incorporate into their own practice.

The day will close with Matthew and Micah hosting the **Social Hour & Mixer**. This time will include the opportunity for additional Q&A, debriefing comments, a vote from the attendees on the best PEP talk, and an interactive game with prizes. All designed to make sure you have a great time but, more importantly, provide the opportunity to implement what you've learned today.



*Serving Our Community Together!*

**ARE YOU INTERESTED IN LEARNING HOW A REVERSE MORTGAGE LOAN COULD HELP YOUR CLIENTS?**



## **CONTACT ME TO LEARN MORE ABOUT REVERSE MORTGAGE LOANS**

### **WHAT YOU'LL LEARN:**

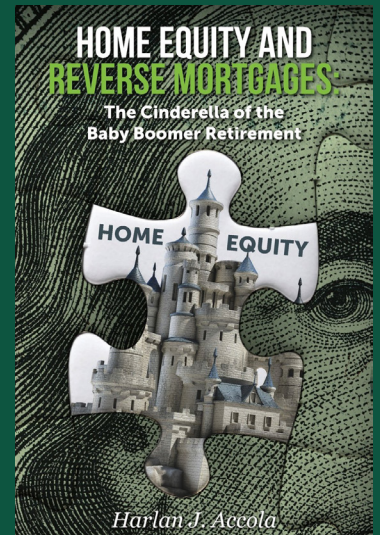
- What is a reverse mortgage loan?
- Are my clients eligible?
- How much could my clients qualify for?
- Why should your clients consider one?
- Provide additional cash flow for other financial services



### **ROB KANYUR**

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robk@fairwaymc.com  
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2020  
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# Brand Strategy Development Case Study: FPA of Greater Phoenix



**Murray Smith**

CFP®, Director of Advanced Planning





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DPL Financial Partners  
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[www.dplfp.com](http://www.dplfp.com)

# Murray Smith

As Director of Advanced Planning, Murray oversees all aspects of the financial planning process in support of the firm's advisors, including tax planning, cross-border planning, estate planning, and financial planning software integration.

Murray was born and raised in Calgary, Canada. He graduated from the University of Calgary with a degree in economics, and in 1995, earned his Master of Arts in economics at the University of Alberta.

After graduating, Murray took a position with the Alberta Treasury as an analyst for the \$13.5 billion (Canadian) Alberta Heritage Savings Trust Fund. Over the next decade, he worked in a variety of marketing and management positions in Vancouver and Calgary. However, Murray's passion remained in the world of finance and economics. He joined a friend from college, an established financial advisor, to help with marketing, portfolio strategy and transformation of the wealth management practice. The position evolved into a comprehensive financial planning role and provided Murray with much of the material which fuels his passion for the profession today.

Murray and his wife, relocated to Arizona in 2014, following the birth of their son. Murray obtained his Canadian Certified Financial Planner™ (CFP®) designation through FP Canada. Shortly thereafter, he secured his US Certified Financial Planner™ (CFP®) Professional designation through the Certified Financial Planner Board of Standards.

Murray is very active in the Financial Planning Association®, the professional association for financial planners, and is currently a board member and president of the Greater Phoenix FPA chapter. He also served as the Communications team leader for 2 years. It was during this time that he developed the chapter's brand strategy.

Murray and his family live in Mesa, AZ. They are avid gardeners, having developed over 400 sq. feet of food gardens and cultivated more than ten types of fruit trees. Murray also enjoys DIY home projects and computer programming, particularly where it helps make their home "smarter." Additionally, Murray is a guitar player. Over the past 15 years, his former band raised over \$300,000 for Alberta charities.

# Workshop

Murray Smith

**Brand Strategy**

**Development**

**Case Study:**

**FPA of Greater Phoenix**

**"Your brand is the  
single most  
important  
investment you can  
make in your  
business."**

*Steve Forbes*



## The Message

Multi-year research into understanding and assessing the challenges chapters face.

How limited resources and capacity impact the ability of chapters to maximize the value they can provide to their members.

That all facets of the organization need to be aligned and working toward the same meaningful purpose articulated through a thoughtful and coherent strategy composed of a vision, mission, and brand.

## The Background

Over 5-years' experience in brand strategy.

Developed FPA Greater Phoenix Brand Strategy.

## The Opportunity

In a world full of trade associations, understanding what FPA can do to differentiate and lift itself out of a sea of likeness into a purposely differentiated prominence and market leadership.

Planners who understand that branding is not a tag line and a logo—those elements are derived from the deep thinking that goes into a brand strategy—have a better chance of meaningfully differentiating themselves; potentially resulting in smarter and more efficient chapter, firm, or practice growth.

## The Take-Away

Resources relevant to connecting Brand Strategy to strategic planning, resource allocation, and success metrics.

A brand strategy to immediately implement for your chapter.

A framework you can use to develop your own brand strategy for your chapter, your firm, or your practice.

A summary template for a 3-5 year strategic plan.



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2020  
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# An Introduction To Dynamic Governance



**Melissa Kemp**  
Executive Director

**FPA** **FINANCIAL  
PLANNING  
ASSOCIATION**  
OF GREATER PHOENIX

Does Your Client  
Have a  
Life Insurance Policy They  
No Longer  
Want or Need?

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# About Melissa

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Melissa Kemp, CFP<sup>®</sup>, AEP<sup>®</sup>, CAP<sup>®</sup>, CNAP<sup>®</sup> currently serves as the contract Executive Director for the Financial Planning Association of Greater Phoenix. Prior to accepting the Executive Director role in 2015, Melissa had been a chapter member since 2000.

She owns Premium Administration, LLC, specializing in providing professional administrative solutions to trustees of Irrevocable Life Insurance Trusts. Operating continuously since 1998, this company accepts new business exclusively through referral networks.

She also owns Premium Organization, an Association Management Company, launched in 2000. Premium Organization provides administrative solutions for many non profit organizations, including 501(c)(3), (c)(4), and (c)(6) type entities.

Melissa uses her financial background, economic and business education, along with the CFP<sup>®</sup> and AEP<sup>®</sup> credentials, in non-traditional ways. Through Premium Administration, she remains exceptionally connected to information and best practices in financial planning, business succession planning, estate planning, income gift and estate tax code nuances, life insurance/risk management options and alternatives. Through Premium Organization, her connection to nonprofit subject matter expertise grows daily. One significant benefit of working with many diverse professional trade associations is observing many different organizational structures and governance methods.

Workshop

Melissa Kemp

# Dynamic Governance

**"If everyone is  
moving forward  
together, then  
success takes  
care of itself."**

*Henry Ford*

## The Message

Behavioral research confirms that obtaining/gaining buy-in to decisions makes them more likely to be accepted, adopted, implemented. We see this with our clients and staff, and thus take extra care and effort to make it so.

Yet, in a boardroom or other governance forum (or in our own offices), Roberts' Rules of Order or ownership shares supply the commonly accepted rules around decision-making. This effectively sets up actions, motions, and decisions that can have as many as 49% of fellow leaders less than enthusiastic, and possibly opposed, to what is decided. And staff? Every one of them may not be on board with what a firm owner deems to be decided.

If our association is to survive, indeed one day thrive, learning alternative methods of governance and decision-making that support reasoned debate efficiently leading to 100% buy in is critical.

## The Background

More than a decade ago, an owner of an Association Management Company was introduced to something often called "Dynamic Governance". So nuanced and so particular and peculiar, it's potential impact on her company, her clients, and her life overall wasn't immediately clear to her. After adopting it and earnestly implementing it with one Association client, the results were undeniable. Melissa credits the immediate implementation of these practices into her business with surviving the Great Recession.

## The Opportunity

Stop wasting time and talent in your board rooms and in your office. Discover a time tested system for bringing the best ideas and efforts of any group, team or staff into focus and moving those ideas efficiently into action. Any financial planner (business owner or partners especially) can implement these self-awareness points and decision-making processes immediately with just a few hours' of exploration and some basic reference tools.

Once you discover the power of Dynamic Governance, further instruction and professional consultants are available through out the United States.

## The Take-Away

Never endure long and fruitless meetings again! When you understand how following this well-defined process moves agendas into efficient productive discussions and decisions, you'll never revert to any other method.

Tired of going back to the same people time and again to get something done? Learn how to bring out the inner activist in every member of your team.



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our community and the  
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# The Freedom to be Yourself = 10x Success



**Colleen Hallinan**

Chief Transformation Officer, Qii Consulting





**Nationwide<sup>®</sup>**

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Nationwide Advisory Solutions are  
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our community and the  
profession of Financial Planning.**

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# About Colleen

With a rich background of expertise and experience in the financial services industry, Colleen is passionate about helping advisors and their teams achieve next-level growth and success. After spending nearly 30 years as a financial advisor, Colleen retired in 2015 as partner from Hewins Financial Advisors, a leading Bay Area-based RIA with \$4 billion in AUM. Early in her career at Hewins, Colleen was a key player in developing the wealth management model for Wipfli Ullrich Bertelson from scratch. Wipfli at the time was a top 20 regional CPA firm looking to build a wealth management practice from the ground up. The Hewins team ran the practice for 18 years, before the two firms split in 2018 and went their own ways.

Colleen's primary role at Hewins was leading the firm's Bay Area advisory team, which grew from one lead and one associate with \$80 million in AUM to a superstar group of Gen Y advisors with nearly \$1.4 billion in AUM upon her retirement. The team earned awards and recognition for quality in wealth management, education, customer service, and growth —and they continue to be praised and recognized by the industry today.

Colleen attributes the success and growth of that team to a system of mindsets and practices she developed that inspired the founding of Qii Consulting. As Qii Consulting's Chief Transformation Officer, Colleen builds and develops advisory teams using an approach targeting the leverage achieved by prioritizing "quadrant ii" activity. As a Gallup-Certified Strengths Coach and a Kolbe™ Certified Consultant, Colleen is dedicated to helping firms grow, thrive, and succeed by building diverse and inclusive teams —starting with discovering and applying the teams' individual and collective gifts and introducing 10x growth strategies.

Colleen serves on the board of the Financial Planning Association of Greater Phoenix, where her primary project is the development of a Career Hub, envisioned as the one master resource to facilitate advantageous matchmaking for financial planning firm employers and the professionals who seek to fulfill their career ambitions: "Where A-Player Aspirations find A-Firm Opportunities." This effort was born out of Colleen's observations that too many successful firms and highly competent players are either a) not finding each other, or b) if they do, the matches don't thrive. The Career Hub goes beyond the matchmaking by creating A-Employer models to increase retention and success by precisely defining business models, cultural expectations, role outcomes, title terminology, and career path and compensation conditions. Colleen's other roles on the board include leading the development of the chapter's core values, and development and management of the role description, performance measures and compensation package for the professional Executive Director position.

# Workshop

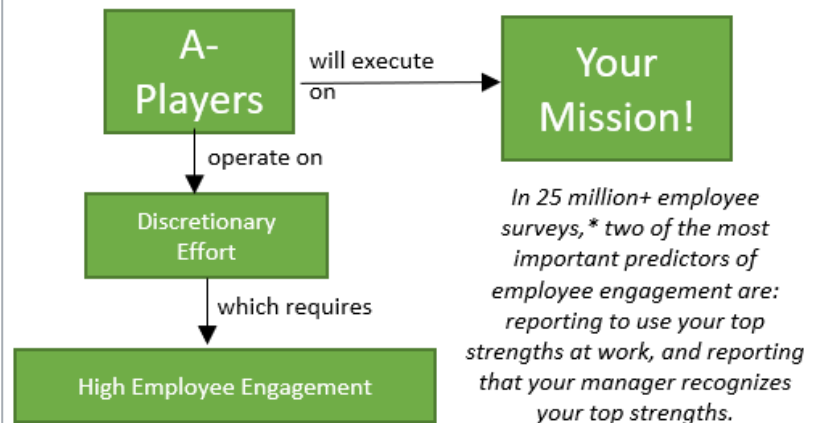
Colleen Hallinan

## The Freedom to be Yourself = 10x Success

For You:



For Your Team:



## The Message

*There's never time for Qii activity. You have to squeeze it into the schedule.* Qii, better known as quadrant 2, occupies the northeast corner of the Importance/Urgency matrix: Important, Not Urgent. And the more time you spend in quadrant 2, the less time you spend in stressed, error prone, quadrant 1: Important AND Urgent! Understanding, developing, and applying your own and your team's strengths is your most important Qii activity, as it puts your collective time and effort to its highest and best use. This is what's known as leveraged activity, when each of you is operating at your best, the payoff in results is multiples of the effort expended.

## The Background

Colleen has 30 + years of experience as a successful advisor and built a financial planning and advisory team managing \$1.4 billion AUM. It all began when she discovered the secret to building a high performing team that would crush goals year after year.

## The Opportunity

It starts with understanding your unique talents, then filling in the gaps with an uber talented team around you.

- ◆ Thrive in the Freedom to be Yourself.
- ◆ Get the right people doing the right work, using their strengths every day.
- ◆ Develop a self-managing team of A-Players.

 *See the chart!*

## The Take-Away

Maximize your energy and maximize your results.

You will hire better, and your people can be the best version of themselves.

Self-confidence is a by-product of productivity. When you're working in your groove, you're energized and motivated to achieve.

# 401 (k) Plan Advisors: Insist on a CEFEX-Certified TPA

Fiduciaries must act prudently and in the best interest of the participants and beneficiaries, which includes the selection and monitoring of the plan's service providers.

By hiring a CEFEX certified third-party administrator (TPA), retirement plan fiduciaries can rest assured that the TPA has already gone through a rigorous assessment, thus helping to fulfill their due diligence obligations.



## What does it mean for a Third-Party Administrator to be CEFEX-Certified?

Click here for a video to learn more:



For more information on partnering with Pinnacle Plan Design to establish or take over administration of a plan, contact:

**Robbie Petrillo**, QPA, QKA  
Director of Business Development  
(602) 792-5957  
rpetrillo@pinnacle-plan.com

**Pinnacle Plan Design, LLC**

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# Advocacy in Action



**Matthew Benson**

CFP®, Financial Planner





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community and the  
profession of Financial Planning.**

<https://cals.arizona.edu/fcs/>



# About Matt

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Matt Benson currently serves as the advocacy chair for the Financial Planning Association of Greater Phoenix. Their team has cut their teeth in grass roots advocacy efforts. They have successfully brought about and passed legislation on the state level, (unsuccessfully) opposed legislation, and have developed seats at the table with the most influential legislators for our industry.

Matt started in the business working with a financial advisor at Mutual of Omaha while in school at the University of Nebraska. He learned the business smiling and dialing as they say. Upon completion of his degree in finance he and his wife, Alexa, moved their things in a single axel U-haul trailer to Phoenix. He worked at Vanguard for his first “real job” where he really learned what people thought about money having the opportunity to talk to 40-60 people a day. In 2015 he took his first step into the independent space with Blakely Walters Wealth Management. In 2020 he launched his own firm, Sonmore Financial.

When Matt is not crunching numbers, he enjoys hiking, biking, exploring national parks, cheering on the Huskers, and going on extensive road trips with his wonderful wife, Alexa and two daughters, Ramsey and Stanton. He has been to 49 of the 50 states, though Alexa has him beat having been to all 50. The road trips they are most proud of are: Alaska, Scandinavia, 3600 miles through the Southeast, Europe, and West/Pacific Northwest through 5 National Parks.

# Workshop

Matthew Benson

## Advocacy in Action

**"If you aren't at the  
table, you're on the  
menu."**

*Michael Enzi*

## The Message

5 years of consistent learning, teambuilding, relationship nurturing, and skills development now yield expanded influence and initial results for financial planners in Arizona.

## The Background

- ◆ 2019: SB1483 – Vulnerable Adult Protection – NASAA Model Act – Yes, that's right, FPA of Greater Phoenix initiated, supported, and ultimately championed
- ◆ 2019/2020: Governor and Treasurer's offices proclaim April as Financial Literacy month in Arizona
- ◆ 2020: SB1557 – slowed down, and had a chance to stop, the Annuity Transactions NAIC rule that in AZ now becomes law.
- ◆ 2020: Relationship with the Treasurer's office connects FPAGP to successful passage of 4 Financial Literacy bills, and a direct link to the Treasurer's Task Force on Financial Literacy
- ◆ 2021: We are strategizing next steps to amend or improve SB1557 to a true Fiduciary Standard

## The Opportunity

Effective Advocacy for our profession with our legislators and regulators means you are:

- ◆ Less likely to be adversely impacted by laws and rules that raise your costs and liabilities without adequate proven benefit,
- ◆ More likely to see legislation that elevates the profession and solidifies your professional standing relative to other (non-fiduciary) financial service providers
- ◆ More likely to be treated fairly by the CFP(R) Board of Standards should something bring you to their attention
- ◆ Easier and higher credibility expanding consumer recognition and appreciation for financial planning in their professional service circles

## The Take-Away

- ◆ Resources relevant to understanding Federal and State legislative districts and Advocacy Alerts
- ◆ An introduction to ALIS
- ◆ Your voice in the 2021 AZ Advocacy priority playlist
- ◆ Immediate engagement in policy formulation relevant to amending a recently passed bill
- ◆ Practice and Confidence with conversations with a legislator
- ◆ Opportunities to laugh, empathize, and envision the elements of a bright future

“

There needed  
to be a **better**  
way to be able to  
serve clients.

”

RIA Jeff Fong went independent so he could put his clients first. We promised we'd do the same for him.

**Maximize your independence.**

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# Who Benefits

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All Professionals with a seat at the Financial Planning table can benefit from attending:

CFP® Professionals and future certificants

Non CFP® professionals who actively deliver Financial Planning, including specialists in domestic relations, retirement income strategies, and succession planning options

CFA charterholders and investment management professionals

Accounting and Appraisal professionals

Charitable Gift Planning professionals

Legal Professionals in the following practice areas:

Estate Planning

Pension and Employee Benefits planning

Domestic Relations (collaborative practice professionals in particular)

Corporate and Business Law

Succession and Business Transfers/Transitions

Financial Industry Compliance

And a series of associated service providers relevant to the Financial Planning Process, including:

Coaches

Academics and Researchers

Finance and Economics Educators

Compliance Practitioners

Exit Planning Specialists

Credit Recovery and Financial Literacy Specialists

Enrolled Agents

Industry Reporters and Consumer Advocates

Financial Industry Wholesalers and product specialists



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# Register Now

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## Members

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\$125 before September 18

\$145 September 19—28

\$165 At the Door

## NonMembers

---

\$145 before September 18

\$165 September 19—28

\$185 At the Door

## 4- Paks

---

\$450 Members and Nonmembers

## NexGen

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\$50 Active NexGen ghost members

**Register**

Please note: Pricing does not include taking the Kolbe A assessment.

Refund policy for individual ticket purchases: 100% if cancelled at least two weeks' ahead of the event, 0% after that. 4-paks: no refunds - we encourage substitutions and additions. If someone purchases a 4-pak and can't fill all 4 seats on event day, we will help fill their remaining seat.



# REACH OUT BEFORE THEY DO

Your clients' goals may need to change because of market volatility. Now is the time to talk.

**We can help with the conversation.**  
[advisors.vanguard.com/marketvolatility](https://advisors.vanguard.com/marketvolatility)

All investing is subject to risk, including possible loss of principal.

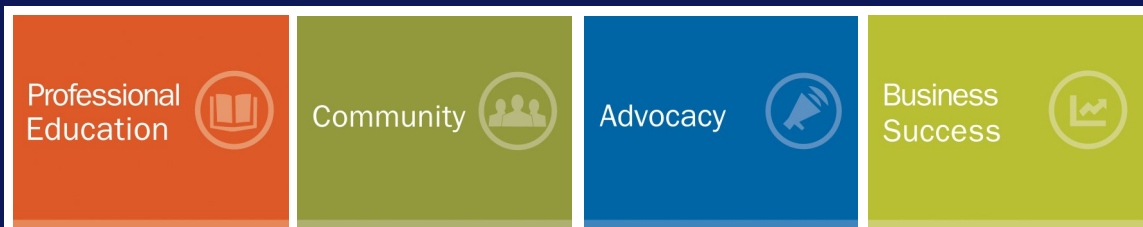
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## The Vision

FPA of Greater Phoenix is the essential hub of our financial planning community.



## The Mission

We Connect CFP<sup>®</sup> and associated professionals to the resources they need and the people who need them.



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Polsinelli Phoenix  
are proud to be investing in each other,  
our community and the  
profession of Financial Planning.**

[www.polsinelli.com/offices/phoenix](http://www.polsinelli.com/offices/phoenix)

# Our Chapter

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The FPA of Greater Phoenix challenges FPA nationally, the CFP® Board of Standards, and other local professional financial associations based upon what our public needs and our planners want. As changemakers and thought-leaders, our Board of Directors is constantly forging new paths and taking plenty of hits – all in the name of navigating a massively shifting environment even as we solidify our standing as a publicly recognized profession.

While our Board is focused on looking ahead of today – meeting tomorrow's challenges, our General Circle comes together efficiently, collaboratively, painstakingly to build worthwhile local programming and activities. The heart of our connection with our consuming public, our conversations with our regulators and our legislators, our interaction with each other- the heart of what we do daily is here. Along with our dedicated staff, they form a team that gets the work done.

And lastly, none of the work we do would be possible without our local Partners. These firms have invested in us. They have invested in you. We thank them for helping us further our mission.

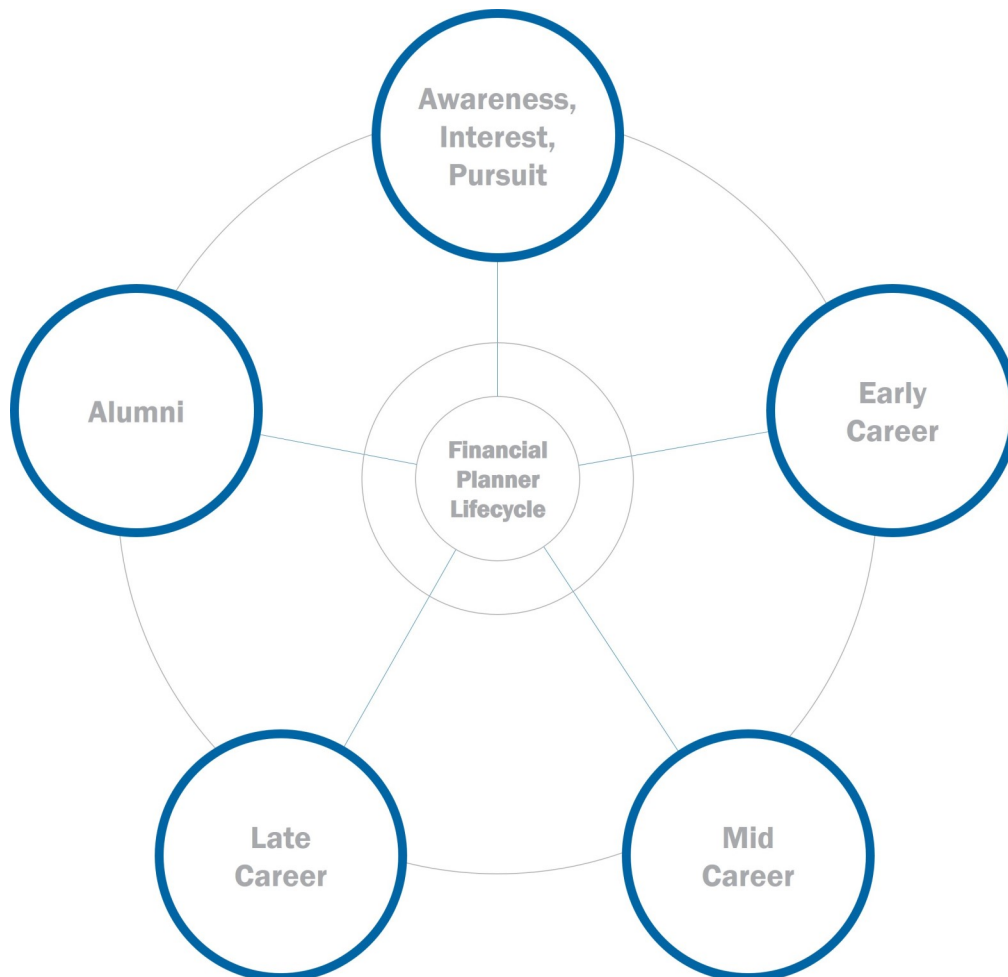
For more information and a complete listing of our Board of Directors, General Circle and staff, and our generous Partners, please visit our website: [www.fpaofphoenix.org](http://www.fpaofphoenix.org)

# Our Promise

FPA of Greater Phoenix is with you, every step of your financial planning career.

From the moment you realize financial planning is a highly esteemed profession to the moment you retire from it, FPA of Greater Phoenix is there with the essential resources you need to achieve all of your financial planning ambitions.

## Our Lifecycle



## Your Journey. Your Ambitions. Achieved.

Professional Development options to enhance your knowledge and your skills.

Community activities to meaningfully connect us to each other as planners and to our neighborhoods and businesses as citizens and service professionals.

Advocacy efforts to increase both our legislators and our general publics' awareness of the CFP mark as the premier designation for financial planning professionals and to spotlight the value of financial planning as a key to their future financial security.

Business Success opportunities and resources to build a foundation of support and innovation available to you on demand.

## Our Ambitions





**FPA of Greater Phoenix and  
Zia Trust, Inc.  
are proud to be investing in each other,  
our community and the  
profession of Financial Planning.**

**[www.ziatrust.com](http://www.ziatrust.com)**

2020  
Professional  
Development  
Showcase

**Tuesday, September 29, 2020**

**8:30 am to 6:00 pm**

**A Robust Online Conference | Experiential Learning**

**<https://www.fpaofphoenix.org/event-3397477>**

