



www.FPAHouston.org

Upcoming FPA Meetings & Events

2016 Chapter Meeting Dates

March 1	Junior League
June 14	Junior League
August 9	Junior League
September 13	Junior League
November 8	Junior League

2016 FPA Houston Financial Planning Symposium

April 21- New Location!
Norris Conference Center
CityCentre

2016 FPA Breakfast Study Groups

March 22
May 24
June 21
August 16
September 20
October 18
December 13

FPA National Events

April 25-28
FPA Retreat
Phoenix AZ

September 14-16
FPA Annual Conference
BE BALTIMORE 2016

Letter from the FPA Houston President

Happy New Year! The global markets have made sure that 2016 is off to a fast and furious start. And with this being a presidential election year and the Iowa Caucus just days away, it promises to stay quite busy.

In the meantime, the 2016 FPA of Houston board of directors has been hard at work on your behalf. I am consistently impressed with their energy and dedication to the chapter and profession. They are committed to being perhaps the most visible and accessible board we have ever had. We want you to know who they are and how to reach them. I introduced each of them to those who attended the January chapter luncheon. You will see more of them during our chapter luncheons, and you will hear from them throughout the year. We will also have more events and opportunities for our membership and corporate partners to interact with the board and our past presidents.

In order to take our chapter to the next level, we will also be soliciting your feedback throughout the year. For those of you who attended the January luncheon, you saw one piece of that. We will continue to have short, meaningful survey questions at each luncheon. Our new Membership Director, Natalie Navellier, is also working with her committee to create and execute a formal member survey. And I will be hosting a series of roundtables with different audiences (corporate partners, new members, NexGen members, etc) to get your input on key issues that the chapter and industry are facing. Please take advantage of these various opportunities to have your voice heard. And please do not hesitate to email or call me throughout the year with suggestions for improvement.

We are truly blessed to live and work in such a vibrant, diverse metro area. FPA of Houston is one of the largest chapters in the country. We have more than 500 members and are growing. We have a lengthy list of past presidents, board members and volunteers who have contributed endless hours through the years and continue to stay active. We have an ever-growing list of NexGen advisors who are enthusiastically giving their time and energy to the chapter and profession. And we have some of the most knowledgeable, steady, experienced advisors in the country helping to guide those younger folks along the path. For all of this and much more, I am deeply thankful and genuinely excited about the future.

Having said that, there is much more we can do. If you have any desire to serve within the chapter, please just say the word. We will help you find the right spot. There are many opportunities to contribute, and we can only progress as a chapter in proportion to the number of members who volunteer for those opportunities.

I am sincerely grateful to be part of this great group of members, and I treasure my association with each of you. Let's move forward together and make 2016 our best year ever!



Sincerely,

Ben Simiskey, CFP®, CPA/PFS
FPA Houston President

FPA Houston Financial Planning Symposium

NORRIS CONFERENCE CENTER | APRIL 21, 2016 | HOUSTON, TX

Save
the
Date!

New Location!



The FPA Houston Financial Planning Symposium is designed for all financial planning industry professionals. More than 10 educational sessions will be available, most of which qualify for Continuing Education credit.

This premier Conference has a national reputation for providing knowledgeable inspiring speakers and excellent networking opportunities for the more than 200 financial professionals who attend. Attendees will have the opportunity to meet face-to-face with leading industry professionals and visit with over 25 event exhibitors.

Norris Conference Center

803 Town & Country Blvd., #210

Houston TX 77024

norriscenters.com/houston-citycentre



FPA 2016 Highlights

- Top speakers in the nation! Industry expert keynote and breakout presentations on financial planning topics across all areas
- Over 25 companies in the exhibit hall displaying the latest products and resources to support your practice
- A flexible schedule that allows you to customize your learning experience based on your needs and schedule
- Regarded as one of the best financial conferences in the country....and it's right in your own backyard
- Tons of continuing education
- Networking with top financial planners and industry vendors for new friendships and partnerships!

2016 Symposium...
A tradition like no other

FPA Houston Career Center

Your destination for exciting Financial Planning job opportunities and the best resource for qualified candidates within the Financial Planning Industry.

Searching for a job within your industry?

We feature various Financial Planning jobs.

Looking to fill a position?

This job board is custom tailored for the Financial Planning industry, which means we attract the most qualified professionals in Houston.

<http://fin.tx.hou.associationcareernetwork.com>



An Investment With a Return CFP® Certification Education Program

Learn more about our offerings during an information session.

The Rice University [CFP® Certification Education Program](#) – available in classroom and online formats – teaches the core curriculum necessary to take the CFP® certification exam. Our comprehensive program includes a financial plan development (capstone) course, fulfilling the educational requirements to sit for the CFP® exam. Students successfully completing the course will have the opportunity to earn a Rice University Certificate of Achievement.

Classroom Format

Section Dates: Tuesdays and Thursdays between August 9, 2016 and May 23, 2017, 6-9 p.m.

CEUs: 22.8

On-Campus Information Session: Friday, June 17 at Noon

[RSVP NOW](#)

Online Format

Section Dates: Monday's and Wednesday's between August 8, 2016 and May 24, 2017, 6-9 p.m.

CEUs: 22.8

Online Information Session: Monday, June 20 at Noon

[RSVP NOW](#)

Rice University
Susanne M. Glasscock School of Continuing Studies
glasscock.rice.edu/cfp
david.frels@rice.edu
713-348-6167



Susanne M. Glasscock School of
**CONTINUING
STUDIES**

2016

FPA Houston
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Administrative Staff

Debbie Rynas

Public Forum Breakfast in Houston



A complimentary continental breakfast will be served

CFP Board Houston Area Public Forum

Thursday, February 18, 2016, 8:00-10:00 a.m.

The Westin Oaks Houston at the Galleria
5011 Westheimer at Post Oak
Houston, TX 77056

We Want to Hear from You! Make Your Voice Heard

Complete Details Online @
<http://www.cfp.net/about-cfp-board/commission-on-standards/public-forums/public-forum-breakfast-in-houston>

HOUSTON AREA

Thursday, February 18, 2016
8:00 – 10:00 a.m.
The Westin Oaks Houston at the Galleria
5011 Westheimer at Post Oak
Houston, TX 77056

Register at: www.CFP.net/HoustonForum

Note: This is not a FPA event and all questions and registrations must be directed to the CFP Board.

Contact Us

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www.FPAHOUSTON.org

2016 FPA Houston Season Tickets

Season Tickets Available for a Limited Time

The FPA Houston Season Ticket remains the best value ever! Pricing still remains the same as it was in 2008. This is a great way to attend the FPA Houston programs in 2016 at a significantly discounted price. Approximately 25+ CE credit hours can be earned throughout the year.



Season Ticket Package Options:

FPA Professional Member Season Ticket Package: \$325

BEST VALUE! Includes all chapter education programs and admission to the FPA of Houston Financial Planning Symposium -

A savings of \$200+

- **FPA Member Season Ticket: \$175**

Season Ticket Package includes all chapter education programs -

A savings of \$150+

Season ticket sales will end on 3/31/16. To purchase a Season Ticket or renew online, visit FPAHouston.org; click the Members Area dropdown menu; select 2016 FPA Season Ticket. FPA Members must log in with name and password. Season tickets apply to the 2016 calendar year.



We Need You!

If you have an interest in serving on the FPA Houston Board of Directors and are interested in any of the following positions contact FPA Houston at execdir@fpahouston.org.

2016 committee positions for all areas are also available.

Houston NexGen

Secretary

Treasurer

Technology

Public Relations

Allied Professionals

Advocacy



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 to FPA-PAC visit:
www.fpanet.org/member/govt_relation/fpa_pac.cfm

FPA Houston Member Anniversaries

Congratulations to the following Houston chapter members who are celebrating significant FPA Membership Anniversaries in...

JANUARY - FEBRUARY - MARCH

25 Years

Richard Wong, CFP®, CPA

20 Years

William Goldberg, CFP®
UBS

Bert Simon

15 Years

P. Mitchell Clark, CFP®, CLU, ChFC, MSFS
MitchellClark & Company

David George, CFP®

Paige Guinn, CFP®
Integra Wealth Advisors, LLC
Former FPA Houston President

Daniel Michalk, CFP®
Waterway Wealth Management

Sydney Motes, CFP®
Patriot Wealth Management

Craig Narum, CFP®
Trisperity Advisors

Douglas Neal, CFP®
Neal Financial Group

Elizabeth Soto, CFP®
Mass Mutual

Monica Woodward, CIMA, CPWA
Morgan Stanley Smith Barney

5 Years

Karen King, CFP®, CPA, CDFA
Karen Hook King, CPA

Trevor Shakiba, CFP®, CRPC, AAMS
The Shakiba Group

Yvette Webb, CFP®
Frost Bank

10 Years

Laurie Clark, CFP®
Woodlands Wealth Builders

James Coffee, CFP®

Carolyn Galfione, CFP®
Linscomb & Williams

Heath Hightower, CFP®
Financial Synergies Asset Management

Jay Kabad, CFP®
JayKay Wealth Advisors, Inc.

Jacob M. Leon, CFP®

Debra Marfin, CFP®
Houston Trust Company

Willie Miles, CFP®
Miles Wealth Management, LLC

Tracy Miller CFP®
T. Miler Financial

Jennifer Moore, CFP®

Amanda Neal, CFP®, CPA
Finley & Neal, P.C.

Richard Newland, CFP®
Principal Financial Group

Joseph Shemenski, CFP®
Raymond James & Associates

James Trippel, CFP®
JW Trippel

George Williams, CFP®
Linscomb & Williams

Kimbrough Winston, CFP®
PPCLoan, Inc.

Bryan Zschiesche, CFP®
Financial Synergies Asset Management

Welcome New Members



Bahgi Berhane
Keller Williams Memorial

Brent Bohall, CFP®
IMG Financial Group

Jeffrey Davis, CFP®

Chris Marney
Wolff Companies

Thomas Orr
Georgetown Mortgage Company

James Starnes
MetLife

Jonathan Swanburg, CFP®, MBA, J.D.
TriStar Advisors





New Social Media Research from FPA and LinkedIn!

One thing is clear. Today's consumers of financial services are expecting their advisers to not only give sound advice, but to educate their clients on why the financial decisions they are making are either prudent or misguided. A recent study by LinkedIn and FPA revealed that while the fastest growing financial advisory firms employ many traditional strategies and tactics to spur business growth, they are also engaging in more progressive communications approaches, including social media and thought leadership. [Get the research now!](#)

Knowledge Circles



Learn Your Way

FPA's Knowledge Circles are gathering places for like-minded members who want to engage in dialogue about best practices and innovations on particular topics. Knowledge Circle participants also serve as content experts who help guide the creation of FPA content and educational programs.

- Knowledge Circles have a co-creative and structured interactive format facilitated by 3-4 FPA member hosts.
- Knowledge Circles research and discussions provide implementable takeaways.
- Knowledge Circles are focused on co-creating ideas and content between FPA and KC participants. They are in alignment with one another.
- Knowledge Circles receive program content from FPA. These content ideas are cycled through KC members, who in return give FPA their opinion on future programming.
- Knowledge Circles are closely aligned with the Journal of Financial Planning.



Current Knowledge Circles are: Business Success, Estate Planning, International/Cross-Border, Investment Planning, Retirement Planning, Tax Planning and Tax Strategies, Theory in Practice (Academic/Practitioner) and Women and Finance.

Each Knowledge Circle decides how it wants to connect. Online discussion forums, on-camera webinars, happy hour chats, in-person meetings – all of these are possible ways to gather.

There are two ways to participate:

Join a Circle: Five Knowledge Circles are already in place. They are Business Success, Estate Planning, International/Cross-Border, Investment Planning and Retirement Planning. These groups meet monthly and have regular online conversation. Go here to sign up. Tax Planning, Women and Finance and Theory in Practice will launch in-person at FPA BE: Boston 2015, FPA's annual conference.

Become a Host: Critical to the success of each Knowledge Circle, hosts will start conversations, encourage engagement and nurture the continued growth of their community. Each Knowledge Circle has up to three hosts (minimum 12-month commitment). An overview of benefits and responsibilities is here. It is critical that hosts have certain skills and capacity to be successful in this role, so potential hosts will need to apply.

To learn more visit: www.onefpa.org/community/Knowledge-Circles

PLATINUM LEVEL PARTNERS



GOLD LEVEL PARTNERS



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Thank You to our 2016
FPA Houston Corporate Partners