



www.FPAHouston.org

Upcoming FPA Meetings & Events

2016 Chapter Meeting Dates

| | |
|--------------|---------------|
| CFP Ethics | |
| June 14 | Junior League |
| August 9 | Junior League |
| September 13 | Junior League |
| November 8 | Junior League |

2016 FPA Houston Financial Planning Symposium

April 21
Norris Conference Center
CityCentre

2016 FPA Breakfast Study Groups

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

FPA Houston Financial Planning Symposium

Don't miss your opportunity to join your peers at the FPA Houston Financial Planning Symposium on April 21 where we will explore all aspects and areas of financial planning, asset management and **succession planning** trends. This conference is an exciting opportunity to hear from nationally renowned speakers and industry experts and enjoy a day of learning, networking and mentoring. Our conference was created to expand on the education provided to local chapter members who come from a variety of backgrounds and disciplines. The FPA Houston Symposium has earned a reputation as one of the best conferences in the country through providing high quality, technically knowledgeable speakers and excellent networking opportunities. At this conference planners and advisors will receive the practical guidance you need to «develop the most effective planning strategies for your practice and clients. Learn how to help your clients incorporate the right mix of planning vehicles, achieve specific financial objectives and understand the underlying methodology.

CE Credits:

Attendees can earn the following CE, based on sessions attended:
5.5 CFP, CPA, CIMA, NAPFA

Who Should Attend

Financial advisors; Insurance industry agents; Family-oriented business owners; Small and medium sized business executives; Entrepreneurs; Investors; Attorneys; Family estate planners; Tax professionals



Norris Conference Center • April 21, 2016

New Location!



Norris Conference Center

803 Town & Country Blvd., #210 - Houston TX 77024

2016 Symposium... A tradition like no other

Win An iPad Mini!

VISIT ALL OF THE SPONSORS AND EXHIBITORS
FOR A CHANCE TO WIN AN APPLE IPAD MINI 2!!



KEYNOTE SPEAKERS / SESSIONS

Engaging Millennial's - Financial Planning's Rubik's Cube: How to Focus Your Practice on Millennial's



Eric Roberge, CFP®
Founder of Beyond Your Hammock

FPA State of the Union



FPA National President Elect
Shannon J. Pike, CFP®

Succession Planning Panel Discussion

Moderator: Shannon J. Pike, CFP®
Panelists: Rob Thompson; Eric Roberge; Brie Williams &
George Hartman

Positive Thoughts Lead to Positive Results How to Tune Up Your Attitude and Prevent Your Engine from Burning Out



Joel Weintraub, M.Ed, B.S.

FPA Houston Symposium Sponsors



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Thank You to our 2016
FPA Houston Corporate Partners

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

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2016 FPA Houston
Breakfast Meetings

FPA Houston breakfast meetings / study groups are now FREE for all FPA members. Guests are always welcome!

Location! Pricing!

Hub International Offices
FPA Members - FREE!
Guests \$20

Dates!

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



CE credits are included, based on the topic (CFP, CPA, Insurance)
Look for details on our website - www.fpahouston.org. We hope to see you there!

If you are interested in speaking or sponsoring a breakfast meeting please contact FPA at execdir@fpahouston.org. Thank you to Hub for sponsoring the location.



Contact Us

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www.FPAHOUSTON.org

Foundation for Financial Planning

Foundation-Finplan.org

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**

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

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Do 1 Thing.
One **Thing** Leads to Another.

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...

APRIL - MAY - JUNE

30 Years

David Bergeron, CFP®
Bergeron Susman & Co. LC

25 Years

Vernon Laywell, CFP®
Laywell Financial Services

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Michael Levy, CFP®
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Efficient Wealth Management, LLC

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Houston Financial Center

Christine Nutt, CFP®

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Marc Schindler, CFP®
Pivot Point Advisors, LLC

Scott Staples, CFP®
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5 Years

Joseph Radzwill, CFP®
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FPA Member Benefits

membership.onefpa.org/benefits

As an FPA member, you gain access to the expert resources, advocacy initiatives and networking opportunities. Visit the FPA National website to view a full is of your valuable membership benefits!

Welcome New Members



Michael Albert

Lyle Boudreaux
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Jonathan Bracewell, J.D.
MitchellClark & Company

Karen Burton
Amegy Bank

James Chandler, CFP®
Besseter Investor Services, Inc.

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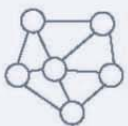
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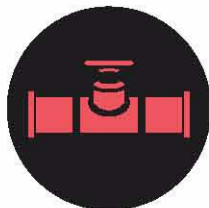
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