

## NATIONAL CAPITAL AREA CHAPTER

### FPA NCA MEDIA TRAINING AND LUNCHEON AGENDA:

**Thursday, March 14, 2019**

Bethesda Country Club, Bethesda, MD

**9:00 AM – Check in for Media Training**

**9:30 AM – 11:30 AM – Media Training with Ben Lewis, Director of Public Relations for the Financial Planning Association**

**11:30 – 12:30 Buffet Luncheon**

**Approx. 12:15 PM – Opening Announcements – Chris Rivers, CFP®, FPA NCA President**

**Welcome and Introduction of our Sponsors Attending our Luncheon:**

**Vernon Biggs – FlexShares – Platinum Sponsor**

**Mike Kondras – Hines – Platinum Sponsor**

**Tom Flynn – Russell Investments – Platinum Sponsor**

**Jeff Leone – American Century – Gold Sponsor**

**Shane Chareonchump and John Buchanan – Asset Mark – Gold Sponsor**

**Sean O'Brien – First Eagle Funds – Gold Sponsor**

**Dan Reilly – Thornburg Asset Management – Gold Sponsor**

**John Harrington – Amundi Pioneer – Silver Sponsor**

**Brooks Biggs – Folio Institutional – Silver Sponsor**

**Introduction of Luncheon Speaker, Jeff Lanza**

**Presentation: Cyber Security**

**2:00PM**

**Conclusion – Please make sure that you have recorded your CE by completing the Course Listing and Evaluation and return it to the registration desk. You must complete the paper form to receive your Credits and have them filed with the proper authorities! Thank you for attending our March Program!**

#### UPCOMING FPA NATIONAL CAPITAL AREA PROGRAMS

More Program details posted in the March Newsletter!

**March 21, 2019 – Reunion Happy Hour – All Members Welcome! – Chima restaurant, Tysons Corner, VA**

**April 18, 2019 – Happy Hour with One CE – Georgetown, Washington, DC**

**April 24, 2019 – Platinum Sponsor Flex Shares – Lunch and Learning followed by Topgolf**

**April 25, 2019 – After Tax Celebration – Happy Hour at Kalypso's, Reston, VA**

**May 2, 2019 – Charity Golf Event – 1757 Golf Club, Dulles, VA**

**June 6, 2019 – Spring Symposium with Ed Slott and Mary Beth Franklin – Dulles Hyatt, Herndon, VA**

**June 11, 2019 – NexGen Study Group – McLean, VA**

**June 18, 2019 – Pro Bono Event for Service Members – Quantico Base, VA**

**June 27, 2019 – NexGen and Intern Happy Hour Bash – Tysons Biergarten, Tysons Corner, VA**

More details and Registration posted on our website at [www.fpanca.org](http://www.fpanca.org)!

**FPA National Capital Area Presents  
Member Reunion Happy Hour  
March 21, 2019  
Chima Restaurant, Tysons, VA  
20th Century Club and Member Happy Hour Social!**

**Hurry! Register Now for this Great Program!**

**It's time to party like you remember 1999! March 21 at Chima from 5-7pm.**

**A lot of people responded to the invitation and attended our reunion for the past three years for planners who were active in the 1990's and before! It was so much fun, we decided to do it again, but moved the summer date to Spring!**

**Do you remember the Mid-Atlantic Retreat? Were you a member of the ICFP or the IAFP, before there was a Financial Planning Association? Did you earn your CFP designation during the last millennium? Would you like to spend a pleasant evening catching up with old friends and colleagues? If you are willing to admit having been around in the 80's and 90's, you're invited, whether you are still in active practice or not.**

**We'll meet at Chima at Tysons, where the FPA NCA has held a number of events, from 5 to 7 on Thursday, March 21.**

**Current FPA NCA Members are also invited so that we can all network together!**

**It would be helpful if you would register on line for this event so that we plan appropriate refreshments!**

**Thank you and see you soon!**



**REGISTER ON-LINE NOW – [HERE](#)**

**FPA National Capital Area Presents**

**Happy Hour with ONE CE**

**April 18, 2019**

**Georgetown, Washington, DC – Office of Capital Asset Management Group**

**Members: \$35 - Non-Members: \$55**

**Price includes beer, wine, light food and parking at the 1000 Potomac Street Parking Garage!**

**LIMITED REGISTRATIONS DUE TO SPACE LIMITATIONS! REGISTER EARLY FOR YOUR PLACE!**

**Georgetown - Office of Capital Asset Management Group**

**Continuing Education-1 hour CE- approximately 5:00 – 6:00PM, Check-in at 4:30PM, networking before and after the presentation!**

**1 CFP, 1 CIMA, 1 MD Insurance and 1 VA Insurance Pending Approval! CPA CPE Offered!**

**April 18, 2019**

**Topic: Tax Management: A timely and practical workshop that will help you quantify the value of tax management for clients and prospects as you review their newly filed 2018 tax returns!**

**Presented by: Tom Flynn, Russell Investments**

**SAVE THE DATE!**

**CHARITY GOLF CLASSIC**

**MAY 2, 2019 – 1757 Golf Club, Dulles, VA**

**Join as a Sponsor, a Player, or Attend Dinner!**

**Registration Open on Website!**

**Something New! Virtual Golf Competition!**

**Play with friends on virtual screens!**

**See the website for details!**



THE 26TH ANNUAL  
FINANCIAL PLANNING ASSOCIATION OF THE NATIONAL CAPITAL AREA  
**CHARITY GOLF CLASSIC**

**MAY  
2  
2019**

**1757 Golf Club**  
45120 Waxpool Road  
Dulles, Virginia 20166

11:00AM REGISTRATION

**SHOT  
GUN  
START  
NOON**

Fee includes lunch, green fees, open beverages on the course and buffet dinner during post-golf awards

**Early Bird Registration - \$175/person**  
**Early Bird Foursome Discount - \$575**

— After April 1st —





**\$225/person and \$675/Foursome**

Proceeds support the Foundation for Financial Planning and FPA NCA pro bono efforts.

**SCHEDULE**

11:00 AM - REGISTRATION  
NOON - BOX LUNCH  
NOON - SHOTGUN START & OPEN BEVERAGE CART ON GOLF COURSE  
6:00 PM - BUFFET DINNER & AWARDS

— PRIZES AWARDED FOR —

- |   |  |
|---|--|
|  1 <sup>st</sup> , 2 <sup>nd</sup> , 3 <sup>rd</sup> Place |  Closest to Pin |
|  Longest Drive   |  Hole in One    |



**SPRING SYMPOSIUM BOOKED!**

**THURSDAY, JUNE 6, 2019**

**DULLES HYATT, HERNDON, VA**

**EARLY BIRD RATE ENDS MARCH 15, 2019 – SAVE \$100 NOW!**

**TWO KEY NOTE SPEAKERS BOOKED!**

**ED SLOTT**



**AND MARY BETH FRANKLIN**



**MORE DETAILS SOON! REGISTRATION OPEN ON WEBSITE NOW!**