

### 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. <u>You must complete the paper form to receive your Credits and have them filed with the proper authorities!</u> 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 estaurant, 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!



# 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!







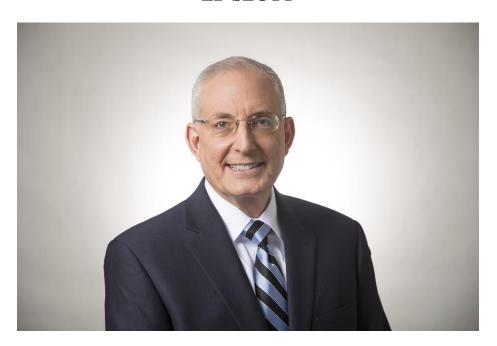
## **SPRING SYMPOSIUM BOOKED!**

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!