Letter from the FPA Philly Tri-State President

Dear Fellow Members,

As we enter the chilly months of November and December, I am forced to slow down (I have to now because my bones creak in the chilly air) and think back on another year. I ask myself, “Did I spend enough time with my wife and children?”, “Did my business grow?”, “Are my clients happy?”, “Did we provide a good experience to our members?”

As a board, we are always asking ourselves that last question and challenging ourselves to think of new ways to engage our members. We are always considering moving the location to new venues. The summer meeting at eMoney was a result of that thinking. We are always looking for new speakers that engage and educate and always on the lookout for CE. Some of those speakers deliver and some do not but we will always try.

We also continue to look to establish alliances with like-minded organizations that we believe would benefit our membership. One example of that is an alliance with the Philadelphia Society of People & Strategy (PSPS) who had a Leadership Forum in Philly on Nov 2. Information was posted on the website.

As for FPA specific events, November is shaping up to be an action-packed month. On *November 4* at the Philadelphia Downtown Marriott, we held our **3rd Annual Career Day**. Due to the school calendar, it was recommended to us to hold the event in the Fall versus early in the year so we have switched the timing of the event from this point forward. Thank you to board member, Benjamin Cummings, and to Cynthia Axelrod, Professor at Temple University, for your work in making this happen. It was a most successful day with 15 employers interviewing almost 60 candidates.

Our final quarterly meeting for the year will be held on *November 15th at the Union League of Philadelphia*. It should be a great event and I encourage you to sign up. We are excited to have *Daniel Zajac, CFP®,* join us to speak on Succession Planning. Following Dan will be *John Quinn*, Esq. speaking on the DOL Fiduciary Duty Rules and Their Impact on Advice to Retirement Investors.

A big change that has occurred over the last few years is the number of events that our chapter holds for our members, including the quarterly meetings, Happy Hours, Study Groups, Symposium and Fall Retreat. As a result, it can be challenging to keep track of it all. A board member, Beth D’Andrea, has found a solution to that problem. She has created a calendar that will be integrated into the chapter’s website redesign. This calendar will provide the full year’s list of activities so you can be sure not to miss anything. We hope to have the website redesigned over the next couple of months. We are very excited for the changes.

We are very excited for 2017 as we have already begun filling out the calendar. Our slate for early 2017 includes Wade Pfau, Dr. Christopher Geczy from PENN, a representative from the PA Dept of Banking and hopefully, the DOL.

Thank you for your membership and enjoy the rest of your 2016!!

Happy Thanksgiving!

Vincent R. Barbera, CFP®
FPA Phila Tri-State President