

Incoming President's Message – Karen Miller, CFP®

I would like to first start off by acknowledging Matt Page, Jenny Hood and all of the past presidents who have shown dedication to the profession and our chapter, and provided a framework for leadership so that I can step in and help guide our organization in 2019. However, I definitely won't be doing this alone and want to thank the 2018 and 2019 Boards, our strategic partners and our members.

We met in November to discuss our past achievements and create our strategic plan for the year. Some of the highlights are:

Advocacy: Welcome to our new Advocacy Director Claudia Kane. She'll be keeping you updated with FPA's efforts to make our voice heard locally and on Capitol Hill. Do you realize that many government representatives do not have a clue what financial planning is? Do you also know that they wanted to tax the services we practitioners provide to clients? Luckily that was quashed. If you want to help educate our representatives, you'll have the opportunity to do so by participating in Sacramento Advocacy Day in March and other events.

Career Development: Welcome to Daryl Wong, our new Career Development director. Among other endeavors, he'll be participating in our chapter's upcoming partnership with CSU, Sacramento and the creation of a new advisory board for their Personal Financial Planning (PFP) program. Also, a big Thank You to Debbie Grose for reaching out to the College of Business Administration at CSUS and getting the ball rolling on this. Our first meeting is in mid-January, so expect to hear updates throughout the year. As Debbie said in her email *"the possibilities are endless and we have a wonderful opportunity to influence the program/curriculum, cultivate the next generation of planners, and make a wonderful contribution to our amazing profession... not to mention bolster our teams."*

Membership: Patrick "P.J." Johnson will be on hand again this year to help greet and introduce guests and new members at our monthly meetings and periodic mixers. He is also the go-to guy for information about FPA Benefits. If you are a friendly "people person" and like P.J. have never met a stranger, let us know, because the Membership committee might be the place for you. We plan to keep having the mixers and continue to include members of other professional groups like CalCPA, Sacramento Estate Planning Council, and Placer County Estate Planning Council.

NexGen: Co-Directors Mitch Cooper and Kurtis Rohlf are already hard at work planning quarterly events to incorporate students in CSU, Sacramento's finance program and Student FPA Chapter, career changers, and others newer to the profession. They are perfect fit for this role since they are also new to their professions, with Kurtis being a very recent graduate of the CSUS Personal Financial Planning Program.

Programs: Jessy Gilger and Jenny Hood are hard at work and have already planned out about half of our education for the year. You'll hear more in their newsletter article. In case you are wondering, we are considering hosting an Ethics topic in 2019 and already have a volunteer speaker. If you have heard a great speaker with topics you think our members would value, let us know.

Pro Bono: Emilie Andres and Launi Cooper are planning for occasions for us to give back to the community. We're looking at smaller events this year, compared to a large annual Financial Planning Day. Some of the opportunities we have explored are: Financial Planning for Cancer and helping recent wildfire survivors.

Strategic Partners: We surpassed our partnership goal in 2018, and have almost sold out of Gold sponsorships for 2019. Our new director David Laut is working with Launi Cooper to carry that success into next year by finding ways to show our partners how much we appreciate them and by offering them opportunities to connect with our members.

Technology/Media/Marketing - We're still looking for someone tech-savvy to help Ethan keep our Social Media pages current and relevant. If you are that person, or know someone who might be a good fit, let us know.

Finally, last but not least, there has been a lot of noise in the financial press about the OneFPA Initiative. We learned about it at the Colorado Chapter Leadership Conference in November from various individuals, from FPA National and local chapters, who are involved in helping to create it. However, OneFPA Initiative is still in the beginning stages and there's more work to be done. Here's a link to the latest article in Think Advisor from incoming FPA National President Evelyn Zohlen:

<https://www.thinkadvisor.com/2018/12/17/details-on-what-the-new-fpa-is-and-isnt/>

Don't hesitate to reach out to me with any questions or suggestions: karen@gasberfinancial.com