

President-Elect
Karen Miller, CFP®, CPFA

I hope your Summer is off to a great start. It's hard to believe we only have 5 months left in the year, but this is also a time to reflect on what we have accomplished or learned in the first half of 2018.

You never know where you'll find your next great idea. There are many opportunities for learning such as:

- Talking to a colleague at a monthly meeting or quarterly mixer
- Free monthly webinars put on by FPA – some of them even offer CE
- Podcasts such as Michael Kitces #FA Success and Hannah Moore's You're a Financial Planner... Now What? Here's the link to #YAFPNW, but it's also available on iTunes, Stitcher, or wherever you get your podcasts. <http://fpaactivate.org/yafpnw/>
- Speaking of podcasts, our very own Alexandria Cole was interviewed by Hannah in episode #101.
- Local Study Groups. You can start your own or, as an FPA member, join our chapter quarterly as we meet to discuss various topics.

We had our second Study Group meeting of the year on June 21st. It was a case study of a recent widow and her concerns. As Financial Planners, it is often easy for us to apply the technical skills we learned in the financial planning courses and look at a client's data, filter through the information, run the scenarios and come up with potential solutions. However, financial planning is much more than numbers! We spent most of the meeting talking about the "softer" side of client meetings and what that means to each of us in terms of asking questions, really listening to the answers, and also giving the client time and space to share their concerns.

Thank you to Matt for hosting and to everyone who came and shared their ideas. Please watch our website www.fpanc.org for the date, topic, and location of our next lunch time Study Group.

Please feel free to reach out to me: karen@gasberfinancial.com or 916-985-2594 with any questions about FPA or ideas for making our chapter a better community.