

President's Message – Karen Miller, CFP®, CPFA

Hello & Welcome to Spring!

2019 is off to a busy start for FPANC. We have had three interesting and well-attended chapter meetings already covering an Economic Update, Death and Taxes and finally, the latest thinking from MIT's Age Lab. If you enjoyed these meetings, please join us on May 10th for [How to Recruit and Compensate Top Talent](#). It's a great way to learn a few things, chat with your colleagues and meet new people.

This is an exciting time to be a part of our profession and to that end we are working with CSU, Sacramento and their School of Business. We are lucky to have a university in our own backyard with an accredited program that provides students with the educational requirements needed to sit for the CFP exam. Here is an update on our January meeting with CSUS. We are going to start by focusing on four initiatives:

1. Creating a strong connection between students and practitioners by increasing interactions such as students attending FPA meetings and FPA participating in campus events (such as Financial Planning Days on campus).
2. Creating a strong mentoring program **There is still time to sign up to be a mentor or agree to be interviewed by students in the CSUS Capstone course.
3. Creating a strong internship program
4. Creating awareness of the profession initiative – working with the School of business to have a strong social media presence to share resources, happenings, and celebrations of all the activity being generated.

I attended my first Advocacy Day in March and have to admit I wasn't sure what to expect. It's a bit embarrassing, but I have never been to the Capitol, since I didn't grow up in the area and my school didn't feel it was important enough for a field trip. So, while the downstairs is impressive, the upper floors are plain and where the real work takes place. The representatives for Assemblyman Kevin Kiley and Senator William Monning were welcoming and really took time to listen to us, even if they weren't part of a committee specific to our industry or our clients' interests. I highly recommend the experience.

Since it's not in our power to offer Ethics in 2019, I invite you to check out the offering at WedCE via the link below. The cost is \$19.95 and you can take the course from the comfort of your home or office. This is less expensive than anything FPANC can provide.

<https://www.webce.com/catalog/courses/cfp-certification-ce/cfp-board/cfp>

If you work with executives, high-net worth employees or others with stock options, here's an event that you might be interested in attending.

[Financial Planning for Public Company Executives & Directors](#)

myStockOptions.com ADVISOR CONFERENCE
Tuesday, June 18, 2019

Financial Planning for Public Company Executives & Directors is a one-day national conference on June 18, 2019. It will be held this year at the Hilton near the San Francisco airport. It features a respected

group of expert speakers; a very substantive agenda of sessions on various stock, financial planning, and client development topics; networking with advisors focused on these special planning issues; and CFP credits.

Advisors involved in this planning specialty or evaluating this niche are attending. For more details, comments from advisors who attended last year, and the agenda on the conference, see www.myStockOptions.com/conference. For a discount of \$300 on the conference, register by April 18th.

As always, call me at 916-985-2594, email me: karen@gasberfinancial.com, or grab me at a meeting if you have any questions or ideas.