

Outgoing President's Message - Karen Miller, CPFA, CFP®

I can't believe my term as President of FPANC is complete. The time has really gone by fast!

As always, a big Thank You to our members, volunteers, strategic partners and especially the Board. Many of the board members were new last year and jumped into help even though they had busy careers, families, and commitments to other organizations and activities. We couldn't have done it without you! Thank you to Landon Tymochko for being President in 2020. The chapter is in great hands with you as their leader. I also want to thank the other members of the Executive Committee – the folks working behind the scenes to help us accomplish all that we do: Holly Wilkerson (Executive Director), Taylor Rios (Secretary), Matt Page (Past President/Chair). I wouldn't be here today if Matt hadn't convinced me.

We are going to miss the following board members, but hope to see them at events in 2020 and beyond:

David Ghiroso, Treasurer – David is busy running his own company and visiting the grandchildren, but he made time for FPANC the last few years. He helped keep us fiscally responsible and helped us build a healthy reserve.

Jessy Gilger, Director of Programs - Jessy was “voluntold” by Matt Page almost three years ago and has done an outstanding job sourcing and scheduling quality speakers.

Patrick “P.J.” Johnson, Co-Director of Membership – P.J. is really a people person, and it showed when he met newcomers to our meetings and events and spent time getting to know them. He also is quick to pick up the phone and call you rather than send an email (something I'm guilty of).

David Laut, Director of Strategic Partners – David made sure our partners were recognized at each meeting and connected with our members, all while buying a practice, rebranding his business and raising four young children.

Membership is still a struggle for the FPA, both locally and nationally, but we were able to reach different people by switching the location and time of a couple meetings. Also, we worked on by being advocates for the FPA and bringing guests to mixers and meetings. Ray Harrison, Co-Director of Membership would win the prize for bringing the most guests if we were keeping count. We were successful in many of our other areas as well:

Advocacy: Thanks to Claudia and everyone who participated in the March Advocacy Day in 2019! We had the highest number of attendees from our chapter last year.

Pro Bono – Emilie, Launi and their crew had a couple of events to help the victims of the Paradise Camp Fire.

Social Media & Technology – Randy and Drew used their marketing expertise to bring awareness to our chapter by taking and posting pictures of our various happenings: meetings, mixers, and Advocacy Day. We also used targeted Facebook ads to boost attendance at our Pro Bono events.

NexGen & Career Development: We started a Task Force with CSU, Sacramento College of Business to find ways to reach the students in the Financial Planning track. We attended the student FPA Chapter

meetings, Daryl facilitated matchmaking between mentor-practitioners and students. Mitch & Kurtis held a NexGen mixer in Roseville in November. Hopefully the first of many. 😊

Wishing everyone a wonderful, prosperous 2020!

Karen Miller