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A MESSAGE FROM YOUR NEW PRESIDENT

Hello! FPA Hampton Roads has many important initiatives underway to enhance the value of your membership.

First, the \$10 fee has been eliminated for the monthly networking and program meetings at Cypress Point Country Club (7:30 a.m., second Wednesday of each month). We're off to a great start with informative presentations on timely topics in January and February to a growing attendance. Join us to network with your colleagues and learn from our guest speakers. Showcase the benefits of FPA membership to prospective members by bringing a guest with you next month.

Second, we're offering a one-price "season pass" (to members only) good for all the 2002 continuing education programs. For only \$80 you'll save \$70 off the regular \$150 cost of six meetings. Send your payment of \$80 to our PO Box address. If you have already paid for either or both of the February or March C.E. meetings, we'll give you credit for the amount paid if you buy your pass by March 31.

Third, on Feb 20th we sponsored a full-page announcement in the *Virginian Pilot* for our Public Forum. Several members took advantage of this opportunity to include their own ad with this announcement for a modest price. We anticipate two additional *Virginian Pilot* announcements during 2002 to provide additional opportunities to include an advertisement of your own. Include these opportunities in your business plan.

Fourth, the **Public Forum on Closely Held Business** is set for Saturday, March 16th. Leverage this event to your business advantage by inviting several key clients or prospects to attend as your guests. Come spend the day with them, then capitalize on workshop topics to propose the business planning solutions you would like to implement for them. See the Public Forum brochure and program at our website – www.fpaHamptonRoads.com – click on the "News & Events" button.

Fifth, the content of our website is expanding to include, among other things, a members directory with your business address and the opportunity for you to place a listing for the public in our "Choose an Advisor" section under any of 13 categories—Financial Planning, Estate Planning, Special Needs Planning, Life Insurance, Disability Income Insurance, Long Term Care Insurance, Tax Planning and/or

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A MESSAGE FROM YOUR NEW PRESIDENT

(Continued from page one)

Preparation, College Planning, Investment Management, Mortgages, Banking, Retirement Planning, and Fee-only Financial Planning. Increase your visibility to the public by listing in our "yellow pages". Check on upcoming programs and schedules by visiting the "News & Events" section of the website.

Sixth, we've worked very hard to improve our e-mail to you. Our goal is succinct, informative communication. E-mail is the quickest, least expensive means we have of providing you with timely information. Please advise us promptly of changes to your e-mail address.

Seventh, we're continuing to improve on our education opportunities. In addition to the programs announced for February 28th and March 28th, we plan four programs for two continuing education credit hours each. The dates are tentatively set for Thursdays, May 23rd, July 25th, Sep 19th, and Nov 21st. In response to your suggestions, we've found a more central location and are moving from the early morning schedule. We'll conduct these programs over the lunch hour at the Virginia Beach Central Public Library on Virginia Beach Boulevard. We plan to offer a catered "box lunch" for a small additional charge, or you may bring your own "brown bag" lunch with you.

Lastly, I want everyone to know The Financial Planning Association of Hampton Roads was recognized as a GOLD LEVEL ACHIEVEMENT chapter by the FPA for 2001. FPA recognizes chapters for outstanding performance and special achievement in membership development, public awareness, programming, career development and chapter management. FPA Hampton Roads was one of only nineteen chapters to achieve this distinction. There are 119 FPA chapters.

Karl E. Klinger, CFP, CLU
President

WELCOME NEW MEMBERS

Peter Griffin - Griffin Investment Group First Union Securities
Rana Harper
Bonita Lindenberg, CPA
John H. Maser, CFP - Davenport & Company, LLC
Louis Richman, Jr., Esq.
Frances W. Russell, Esq., CFP - Williams Mullen
Daniel Henderson, FLMI – USAA

- CALENDAR OF EVENTS -

REMAINING FPA DATES FOR 2002	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
MONTHLY NETWORKING & EDUCATION MEETING	13	13	10	8	12	10	14	11	9	13	11
CONTINUING EDUCATION PROGRAMS	28	28		23		25		19		21	

NEW CONTACT INFORMATION

PLEASE NOTE THAT OUR ADDRESS HAS CHANGED RECENTLY TO:
FPA OF HAMPTON ROADS
P. O. BOX 6191
NORFOLK, VA 23508-0191

EMAIL CAN BE SENT TO: EROUSSOS@FPAHAMPTONROADS.COM.

2002 PUBLIC FORUM

We are eagerly awaiting the start of our first major Public Service event, the Public Forum on Closely Held Business scheduled March 16, 2002. We have partnered with Dr. Bruce Rubin of the Insurance & Financial Services Center, College of Business and Public Administration, Old Dominion University to develop a full day of superb education for small business owners (less than 100 employees). Our brochure is on the FPA website www.fpaHamptonRoads.com.

We have two nationally recognized keynote speakers and top local speakers covering a wide variety of topics from Valuation to Benefit Plans to E-Commerce to Marketing. With twelve workshop options available, the attendees can pick the four of most interest to them. All this and a free lunch and wine reception!

Since March 16th is a Saturday during Spring Break, we should have the campus at ODU to ourselves. We'll be in Constant Hall (near the Webb Center) from 9 – 5.

Our chapter has provided you with a superb opportunity to show your clients how much you put their interests first! Many of them think they are the only one dealing with marketing, succession or fraud problems. Nudge them, coax them, nag them, buy a registration for them. They need this information!

MEMBERSHIP NEWS

FPA of Hampton Roads is alive and well – and growing!

Our latest membership count is now up to 162. Attendance at meetings is on the rise. According to our latest member survey, the quality of the programs is constantly improving, particularly due to members' input regarding topics and speakers, and members are continuing to reach out and invite or refer other professionals to join us. At the chapter meeting in February, we had 10 guests out of the 30 attending. We have a growing number of attorneys, CPA's, bankers and other allied professionals joining us.

Our membership committee has expanded to serve you better. We are looking forward to presenting another one of our fun and informative Membership Orientation meetings in May. Directories are being revised and a new one will be out in the next few months. If you have any changes of information, please send it in the Executive Director, so we will be accurate at printing. If you have not yet received a member directory and would like one, please let us know and we'll get one to you as soon as possible. They are available at meetings for pick up, but if you're unable to attend, we'll be glad to deliver one to you.

Please let us know how we can deliver more benefit to you on the local level through our Financial Planning Association. If you have questions, referrals, suggestions, or need more information or applications for membership, just call me – Lois Gallo at (757) 490-3883 ext. 148. I will also be glad to come and speak to your office or professional group in regard to membership benefits. Just pick up the phone and call me!

AD INFORMATION

We are now accepting ads for our newsletter. Our newsletter reaches financial professionals throughout the Hampton Roads area.

<u>Ad Size</u>	<u>Members</u>	<u>Non-members</u>	Send copy ready ads with payment to:
¼ page	\$ 50.00	\$125.00	FPA of Hampton Roads
½ page	\$100.00	\$250.00	P. O. Box 6191
Full Page	\$200.00	\$500.00	Norfolk, VA 23508-0191
			Email: eroussos@fpahamptonroads.com

**HOLD THAT DATE!
THE 2002 CONTINUING
EDUCATION SYMPOSIUM
WILL BE OCTOBER 25, 2002
AT THE
NORFOLK WATERSIDE MARRIOTT**

DISCLAIMER

The FPA of Hampton Roads welcomes advertisements from reputable suppliers of products and services to the financial community. However, the FPA of Hampton Roads does not perform "due diligence" on the advertisers, authors or sponsors and cannot guarantee that their offerings or writings are suitable or correct.

The Financial Planning Association of Hampton Roads
expresses special appreciation to

Old Point Trust & Financial Services, N.A.

for their financial support in sponsoring the appearance of:

**Louis A. Mezzulo, Esq.
Member, Mezzulo & Guare, PLC**

for his presentations of

***What Estate Planners Should Know About the EGTRRA of 2001
and
An Update on Family Limited Partnerships and Limited Liability Companies***

at the Financial Planning Association of Hampton Roads'
Annual Continuing Education Symposium October 3, 2001.