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## **PRESIDENT'S CORNER**

As I look back at the achievements of the Financial Planning Association of Hampton Roads over the last year, I feel very proud of all the chapter has accomplished. Our hard work was rewarded at the FPA Leadership Conference last month when FPA Hampton Roads was awarded **GOLD LEVEL** recognition in the FPA 2002 Chapter Recognition Program! The bar for **GOLD LEVEL** recognition in 2003 has been raised, and our new Board of Directors has already begun ambitious plans which include capturing the GOLD for a third consecutive year. Members of FPA Hampton Roads have a great deal to which to look forward in 2003!

There are a number of ways for you to capitalize on your FPA membership. One great way to benefit yourself and the chapter is to recruit a sponsor-partner for 2003. Details of the program are available on our website [www.fpaHamptonRoads.com](http://www.fpaHamptonRoads.com), (click on the "FREE FPA MEMBERSHIP" or "SPONSOR-PARTNERSHIPS" buttons for partnership information or to download an application). If you recruit a sponsor-partner, you will be rewarded with valuable member benefits and the chapter will benefit from the partnership.

Another great way to capitalize on your membership and promote your practice to the public is to add your listing to the "Choose an Advisor" section of our website. The offer to be included on the list is limited to FPA Hampton Roads members and costs only \$25 for a calendar year.

With this issue I conclude my presidency of our chapter and **welcome Ron Pearson, CFP® as our President for 2003**. Ron and the Board of Directors continue in search of members who will give a little of their time to contribute to the activities of the chapter. Please see the listing of current task groups and committees elsewhere in this issue and select an area in which *you* would like to participate and contribute.

I'll conclude by expressing my sincerest thanks to the officers and Board members of 2002 for their hard work and outstanding accomplishments. FPA Hampton Roads has established an enviable record of professional education, programs, public outreach, membership development, and press relations.

Karl E. Klinger, CFP®, CLU  
President

# Hampton Roads FPA is STILL growing strong!

- by Lois Gallo, Director of Membership

In a time when many organizations are struggling and membership is on the decline, we are so excited to see our number of members keep increasing! A great big “thank you” goes out to all our members who have invited their associates to attend the meetings and subsequently join. Through November, our membership total stands at 171.

We welcome the following newest members who have joined our association:

Lawrence Jones	Jane Bennett	Ferdinand Perez	John Sexton
John Guthrie	Steven Secrist	William Kohl	Stephanie Sun
Linda Grim	John Little	Reese Peck	Thomas J. Prieur
Kevin Kreider	Shelley Faber	Larry Dennis	Alvin Smith
Dee Ann Allen	Bill Mullen	John Piscitelli	

Not only is the membership growing, but the Membership Committee is also growing. Our newest committee members are Jane Bennett, a new member, and Reese Peck, a newly transferred member. What a great place to plug in to meet new members and find out more of what your local FPA is doing! We welcome you to consider joining our committee.

Since this will be the last newsletter article I write as your Director of Membership, I want to publicly thank each one of you on the committee for making this an outstanding year. I look forward to continuing to support the committee as next year’s President-Elect. I know that *your new Membership Director, Fran Russell*, will do a great job in moving our association forward in the coming year.

In the meantime (till Dec. 31<sup>st</sup>!), 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**. My email is: [Lgallo@LNC.com](mailto:Lgallo@LNC.com). I will also be glad to come and speak to your office or professional group in regard to membership benefits.

Thank you again for supporting your local FPA, and helping us to grow and to serve you better in 2002. On behalf of my committee, ***we wish you and yours a blessed holiday season and a prosperous new year!***

## - CALENDAR OF EVENTS -

2003 PROGRAM DATES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
MONTHLY NETWORKING & EDUCATION MEETING	8	12	12	9	14	11	9	13	10	8	12	10
CONTINUING EDUCATION PROGRAMS		20	20		22		17		18		20	

PLEASE VISIT OUR WEBSITE [www.fpaHamptonRoads.com](http://www.fpaHamptonRoads.com) FOR COMPLETE PROGRAM INFORMATION AND REGISTRATION INFORMATION OR CONTACT EMILY ROUSSOS AT 622-3622.

# NEW THINGS TO LOOK FOR IN 2003!

Your 2002 and 2003 boards recently met to update our strategic plan and map out new initiatives for 2003.

First thing you will notice is **no fees** for our meetings! **Just come and enjoy yourself.** In 2003 we will have no fees for either the Chapter breakfast meetings or the two hour continuing education meetings. This \$240 benefit (\$10 X 12 Breakfast meetings and \$20 X 6 continuing education meetings) will be covered by an additional \$50 Chapter fee added to your FPA national renewal. Student members won't incur the new fee; neither will new members since it only shows up on renewal. What an **especially great benefit for new members**; no cost for the first year's continuing education!

We have made great strides in public relations, but would like to do more. We have the best relationship with print media, The Virginian Pilot and Inside Business, but want to elevate our visibility with TV and radio. **If you are a CFP® and think you would like to work with TV or radio, please contact Amanda Gift.**

Finally, we are proposing a number of initiatives to promote career development. We want to **provide a scholarship to help students obtain their CFP®, work with universities to match up financial planning students with intern openings locally and help new businesses with mentoring programs, Special Interest Group meetings (i.e. ACT users group, setting up a new office group, marketing group, etc.), and possibly a Bridge the Gap add-on to the Symposium with panel discussions on different business models, ways of doing business, marketing, etc.** We have lots of ideas in this area; what we need is some of you who are willing to help make it happen! If you are interested, **please contact Ron Pearson at rpearson@infi.net.**

## 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.

## 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:
Eighth page	\$ 25.00	\$ 65.00	FPA of Hampton Roads
Quarter page	\$ 50.00	\$125.00	P. O. Box 6191
Half page	\$100.00	\$250.00	Norfolk, VA 23508-0191
Full Page	\$200.00	\$500.00	Email: <a href="mailto:eroussos@fpahamptonroads.com">eroussos@fpahamptonroads.com</a>

***Are you interested in shaping the future of FPA?  
Do you want a hands-on experience using a leadership system  
Which can be incorporated into your business and personal life?  
Contact Jane Bennett now to volunteer!  
[janebennett@ft.newyorklife.com](mailto:janebennett@ft.newyorklife.com) or 628-1880***

**MEMBERSHIP**

Fran Russell/Director

**Committee Members**

Jane Bennett  
Rick Mayo  
A. Reese Peck  
Anthony Scott  
Thomie Williams

**PUBLIC RELATIONS**

Amanda Gift/Director

**Committee Members**

Gayle Blachura  
Owen Etheridge  
Linda Grim  
Rick Mayo

**ANNUAL SYMPOSIUM**

**Committee Members**

Amanda Gift  
Cynthia Jeanguenat  
Karl Klinger  
Mike Leach  
Margaret Little  
Jas Short  
Frank Tehel

**PUBLIC FORUM**

**Committee Members**

Marvin Hicks  
Howard Jordan  
Ellie Lewis  
Ron Pearson  
Randy Shekalus  
Dave Wilbar  
Bruce Zeytoonian

**EDUCATION/PROGRAMS**

Pat Tedesco/Director

**Committee Members**

Jeff Barr  
Steve Gallo