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(Represents paid partners as of 03/03/08)

Platinum Partner



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Sean.Gabriel@us.ing.com

Greetings from the President

Done but not over! Assuming that you prefer to get information and news about the FPA of Hampton Roads in electronic format, we decided to make the change, and this document you hold in your hands with U.S. Postage is the end of an era.

We have been running both newsletters for the last quarter to ease the transition for many but for the snail mail - it's the end of the road.

The main reason for the change: the electronic format allows us to be more responsive and up-to-date. We plan to provide you with one e-mail each month which will include everything you need to know.

So I encourage you to read the electronic newsletter when it comes to your desktop and give us feedback as to how this new format is meeting your needs and things we can do to make it an even better and more efficient tool to deliver what you need concerning the FPA of Hampton Roads.

Mark O. Flaherty, CFP®
President

Career Development

Our chapter has a number of ways to help your career. Every year, we award a \$500 scholarship to a member who is studying for their CFP®. Have you applied? Know someone who should?

We offer a Bridge-the-Gap session every year where panelists from various types of financial planning share their financial planning experiences. They also participate in one-on-one sessions where you can drill down for specific information about financial planning practices. We have partnered with Old Dominion University and look forward to this year's session for undergraduate students, CFP® candidates and new financial planners.

Our chapter also matches up prospective interns with local firms who provide intern opportunities. We typically get inquiries from 8 – 10 students/career changers who are interested in internships. We had five firms participating last year and encourage each of you to consider taking at least one intern this year. We usually get interest from prospective interns starting in February, so please contact us soon!

Make sure you are using all the resources your FPA membership makes available! Contact Kevin Zywna, CFP® at 456-2200 or careers@fpahamptonroads.com.

Kevin Zywna, CFP®
Career Development Director

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And Now Another Word For.....Our Partners!!!

What do you mean by "Partners"? In an effort to more accurately reflect the generous support provided by seven different organizations and to more closely align your local chapter with FPA National, your FPA of Hampton Roads Board has directed that we change the title from "Sponsor" to "Partner". Additionally, my current position description has been changed from "Sponsorship Director" to "Director of Business Relations".

With that bit of administration out of the way, it is important to remember we are truly fortunate to be working with seven such generous, highly respected and supportive Partners. When I say "supportive", I mean not only their substantial fiscal generosity for our Chapter, but also their presence during our monthly breakfast events and yearly Continuing Education Symposium (next scheduled for October 10, 2008). Without our Partners, your Chapter simply would not be able to provide the high level of service and value that you have come to expect.

Please keep our Partners in mind as you conduct your profession on a daily basis. Your clients may be all the better for it. As a reminder, here is our Partner Honor Roll:

Our Platinum Partner is:

ING Annuities

Sean Gabriel is our Point of Contact.
Sean may be reached at:
Email: sean.gabriel@us.ing.com
Phone: 703.626.5863

Our three Gold Partners are:

AIM Investments

Bill Gahagan is Our Point of Contact
(internal Omilla Singhahamad)
Bill may be reached at:
Email: bill.gahagan@aiminvestments.com
Phone: 800.337.4246 ext 7841

Carteret Mortgage Corporation

Michael E. Brown is our Point of Contact
Michael may be reached at:
Email: loanman757@aol.com
Phone: 757.438.3838

First American Funds

Patrick McMahon is our Point of Contact
Patrick may be reached at:
Email: Patrick.mcmahon@firstamericanfunds.com
Phone: 757.652-8376

Our three Silver Partners are:

Fidelity Investments

Traci Simons is our Point of Contact
Traci may be reached at:
Email: traci.simons@fmr.com
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The Norfolk Foundation

Nan Edgerton is our Point of Contact
Nan may be reached at:
Email: nedgerton@norfolkfoundation.org
Phone: 757.622.7951

First Command Financial Planning

Bob Ponton is our Point of Contact
Bob may be reached at:
Email: trgponton@firstcommand.com
Phone: 757.468.7711

Please make a note. When you attend your next monthly breakfast meeting at Cypress Point Country Club in Virginia Beach or Point Plaza Suites in Newport News, be sure to introduce yourselves to our Partners in attendance:

PLEASE HELP! As your Director of Business Relations, I can really utilize your ongoing assistance with potential Partner introductions. For future reference, I may be reached by email at rgponton@firstcommand.com or by phone at 757.468.7711.

MEMBERSHIP NEWS

Take another look at the Financial Planning Association of Hampton Roads' new mission statement. I would like to draw your attention to the last four words "success of our members". It is with these words in mind that I would like to introduce myself as the membership director for our chapter and engage you, the membership, in making 2008 the best year ever to be a member of FPA Hampton Roads. In order for organizations like ours to sustain themselves and grow, a regular infusion of new members with fresh perspectives is required. We believe, as a chapter, that the best way to grow membership is by having existing members that consistently see the value of, and benefit from, their membership in FPA. By having members who routinely take advantage of the opportunities FPA provides to grow professionally, academically, and as a business person, it follows that others looking to do the same thing will be attracted to our organization. How do we facilitate this? By combining good execution of those processes that have always delivered good value to our membership, things like the Annual Symposium, Monthly Networking Breakfasts, and CE meetings, with several carefully crafted new processes aimed at capturing the interest of existing and prospective members. We will work to create a sense of community among chapter members that they will share with others. In this way, not only will we help increase our membership, but we also will contribute to accomplishing our mission of "promoting the value of and public interest in financial planning by advancing the financial planning process" in the Hampton Roads area.

So what are some of the tangible benefits of being an active participant in the Hampton Roads Chapter the Financial Planning Association?

- Free networking and educational meetings on a monthly basis in an enjoyable and professional setting at Cyprus Point Country Club in Virginia Beach and Point Plaza Suites in Newport News
- Continuing education programs conducted five times a year that award two hours of continuing education credits per session for financial professionals at all levels of certification
- Content rich web site with a local member listing to enhance their visibility to the public. Opportunities for financial professionals to contribute written articles for publication via the web are available
- Annual Professional Continuing Education Symposium to provide additional continuing education opportunity over a wide variety of subject matter
- Scholarship opportunity for financial professionals enrolled in a CFP certificate program
- Opportunities to "give back" to the community via the FPA pro-bono program

And what are additional benefits offered by the National Financial Planning Association?

- Yearly subscription to the Journal of Financial Planning: Filled with writings from some of the most prominent writers and financial planning experts in the country
- Between the Issues: An electronically delivered publication with bonus content from the Journal of Financial Planning
- Yearly subscription to Solutions Magazine: Delivering practice management information to help you and your business
- FPA this Week: Weekly e-newsletter keeping you current on FPA happenings and industry events
- 12 free continuing education coupons each good for one Journal of Financial Planning online exam permitting up to 12 additional hours of continuing education per year
- FPA Virtual Learning Center (VLC): Access to educational programs including national meetings and self-study courses at discounted rates. Many VLC sessions are sponsored by national organizations and are given free of charge to members
- Residency Programs: A highly acclaimed program for new planners offering a client-centered training experience using detailed and comprehensive case studies
- FPA's Annual Conference and FPA Retreat: National meetings to build knowledge and immerse yourself in your craft. Members are able to attend at discounted rates
- Free complementary quarterly practice management CDs
- Online Career Center to provide a variety of information on career opportunities
- Online Employment Assistance to post job listings and résumés
- Assistance with placing prospective financial planners in internship programs
- Assistance with CFP certification including discounts on CFP Board registered education programs and review materials
- FPA Café: An online meeting space for conversations can occur among financial professionals FPA Café allows planners to interact via their e-mail or web browser

SAVE THE DATE - JUNE 3, 2008

12:00 noon to 1:30 p.m. at the Reba and Sam Sandler Family Campus *of the Tidewater Jewish Community*

Please mark your calendars to join us for lunch

The Tidewater Jewish Foundation will present

Richard Marker

Nationally Renowned Philanthropy Consultant

who will speak on

“Expanding Professional Services to Clients Through an Understanding of Philanthropic Advising”

The Foundation is sponsoring this event in collaboration with
The Financial Planning Association of Hampton Roads
and The Society of Financial Service Professionals.

The program and lunch is free of charge and will be by invitation.
For Specific details or to RSVP contact Jackie Forman / Tidewater Jewish Foundation - 965-6110

SAVE THE DATE - FRIDAY, OCTOBER 10, 2008

11TH ANNUAL CONTINUING EDUCATION SYMPSIUM - NORFOLK AIRPORT HILTON