

## Get Inspired... Get Involved... Join a Committee



One Thing Leads to Another...Get involved and make a difference! If we all just did ONE THING, imagine the impact we can have on shaping our profession!

### Here are **SOME Things.....** What will your **ONE** thing be?

FPA Committees that would welcome YOU....

**Charity Golf Event:** Have fun, while you network with your fellow professionals and raise money for the Foundation for Financial Planning.

- Join the Golf Committee and help plan the May 6<sup>th</sup> event
- Seeks Sponsors to support this charity event
- Promote this event to members for participation
- Come and enjoy a great day on the course

**Consumer Awareness:** Elevate public awareness; promote financial literacy.

- Lead a basic investment workshop
- Work with the schools on a Junior Achievement Program
- Help Plan and Participate in Financial Planning Week at local events

**Government Relations:** Help shape legislation and the future of the profession.

- Help Organize a Financial Planning Day at the State level.
- Interact with legislators
- Attend a hearing on advisor regulatory issues
- Educate regulators of our services as a resource and counsel to the public

**Member Communications:** Sharpen your communication skills; engage members in FPA NCA events.

- Contribute an article to the newsletter
- Develop Announcements for chapter programs and events
- Develop new ideas for our chapter web site

# Get Inspired... Get Involved... Join a Committee

**Membership:** Increase Chapter membership.

- Help plan a social event
- Distribute membership information at the meetings
- Make telephone calls to welcome new members
- Make telephone calls to encourage members to renew
- Help staff a CFP Exam luncheon for students
- Attend a free Member Breakfast to learn more about our chapter
- Survey Members to assess their satisfaction with our chapter

**Partnerships:** Create alliances with partners.

- Draft a survey to evaluate partner satisfaction
- Meet with partners in your office
- Welcome partners who exhibit at our programs

**Pro Bono: A call to action...** give the gift of education through large-scale initiatives.

- Assist military families
- Volunteer for CAAB financial literacy programs
- Help baby boomers plan for retirement in coordination with the DC Government
- Volunteer for HIP to counsel single mothers on home ownership
- Volunteer with the local school systems on financial literacy programs

**Professional Development:** Reach out to students, encourage new financial planning professionals, and assist senior advisors in keeping their skills sharp.

- Be the FPA NCA liaison to a local educational institution
- Help coordinate a study group for students, beginners or experienced professionals
- Assist in the planning of a Professional Development Program for our Chapter
- Be a Mentor and mentor one new planner for three months

**Programming:** Infinite Possibilities: Integrating our Life and Profession with Education and Inspiration.

- Suggest topics and speakers for educational programs
- Help Build the Spring Symposium with our Sponsor Partners
- Review and critique a potential speakers' presentation in your area of expertise
- Attend our educational programs on a regular basis
- Be a Buddy at Meetings to foster community building
- Invite a guest to a meeting to explore FPA

**Public Relations:** Enhance your visibility and be seen as a financial planning resource.

- Answer finance-related queries from the press
- Develop a relationship with your local newspaper editor
- Attend free training in working with television, radio and print media on February 11



# Get Inspired... Get Involved... Join a Committee

## Questions... Comments... How can I start my One Thing?

### Charity Golf Event

Mitchell G. Berlin, CFP®  
Office Phone: 240-314-4301  
E-Mail Address: [Mitchell.G.Berlin@ampf.com](mailto:Mitchell.G.Berlin@ampf.com)

### Consumer Awareness

Helen Modly, CFP® and Tommie Monez, CFP®  
Office Phone: 540-931-9051  
E-Mail Address: [hmodly@focus-wealth.com](mailto:hmodly@focus-wealth.com) or [tmonez@focus-wealth.com](mailto:tmonez@focus-wealth.com)

### Government Relations

Howard Pressman  
Office Phone: 703-506-0843  
E-Mail Address: [HPressman@ebwillc.com](mailto:HPressman@ebwillc.com)

### Member Communications

Kathleen Sindell, PhD  
[Josh.Halpern@RaymondJames.com](mailto:Josh.Halpern@RaymondJames.com)  
Office Phone: 703-299-1700  
E-Mail Address: [KSindell@gcsr.com](mailto:KSindell@gcsr.com)

### Membership

Cliff Cohen, JD  
Office Phone: 202-895-2799  
E-Mail Address: [Cliff@capocohenlaw.com](mailto:Cliff@capocohenlaw.com)  
Bryan Beatty, CFP®  
Office Phone: 703-506-0843  
E-Mail Address: [bbeatty@ebwillc.com](mailto:bbeatty@ebwillc.com)

### Partnerships

Augie Zullo  
Office Phone: 703-871-1344  
E-Mail Address: [azullo@accessnational.com](mailto:azullo@accessnational.com)  
Rachael DeCosta Martin  
Office Phone: 301-951-4800  
E-Mail Address: [Rachael.DeCosta@Calvert.com](mailto:Rachael.DeCosta@Calvert.com)

### Pro Bono

Tacy Paul Roby  
Office Phone: 301-951-4800  
Email Address: [Tacy.Paul.Roby@Calvert.com](mailto:Tacy.Paul.Roby@Calvert.com)

### Professional Development

Dan Lash, CFP®  
Office Phone: 703-356-4360 x703  
E-Mail Address: [DLash@BruceVaughn.com](mailto:DLash@BruceVaughn.com)  
And Josh Halpern, CFP® ChFC, CLU  
Office Phone: 240-744-7125  
E-Mail Address:

### Mentoring

Chris Rivers, CFP®  
Office Phone: 202-887-8135, ext. 234  
E-Mail Address: [CRivers@afmfa.com](mailto:CRivers@afmfa.com)

### Programming

James Bogart, CFP®  
Office Phone: 703-356-0079  
E-Mail Address: [James.Bogart@rbc.com](mailto:James.Bogart@rbc.com)  
Jeanie Schwarz, CFP®  
Office Phone: 703-734-4620  
E-Mail Address: [Jeanie.Schwarz@Harris-SBSB.com](mailto:Jeanie.Schwarz@Harris-SBSB.com)

### Public Relations

Helen Modly, CFP® or Tommie Monez, CFP®  
Office Phone: 540-687-3987  
E-Mail Address: [HModly@focus-wealth.com](mailto:HModly@focus-wealth.com) or  
[TMonez@focus-wealth.com](mailto:TMonez@focus-wealth.com)