

Our VISION

FPA of Greater Phoenix is the **essential hub** of our financial planning community.

Our MISSION

We **connect** CFP® and associated **professionals** to the resources they need and the **people** who need them.



Dear Partner –

**You have the resources and expertise our community needs and wants!
Follow these tips to ensure the best possible connection with FPAGP members.**

Direct all emails and questions to: **Stephanie Weadock**
(admin@fpaofphoenix.org)

NOW!

Upon receipt of this notice, provide the following information via email:

- 1. Presentation Title.** Keep it simple, but catchy if possible – this is the RE members will see in the inbox.
- 2. Content Description.** One to two paragraphs, why should they attend? How will they benefit?
- 3. Learning Objectives.** Three bullet points, minimum—this is what members will be able to apply in their practice. (Your team does not need to tackle CE details for Partner CEEvents. FPAGP as the course promoter will submit to the CFP® Board of Standards for pre-approval for CE using this information.)
- 4. Professional Headshot and Current Bio for the Presenter(s).** Or the link for an online bio.
- 5. Marketing messaging info.** If you have it, for social media (Facebook, LinkedIn, Twitter).



Make It Interactive!

TIP!

Encouraging members to engage with you and with each other (if possible) improves the rigor and overall value of your content. Check out FPAGP's [Learning Hub](#) for useful tips and info.



Partner CEEvents are virtual events via the chapter's Zoom Room.



**3-5 days
prior**

Please email to us:

- 1. Formal outline or PowerPoint of your presentation**
- 2. Any other materials or other needs required to deliver your presentation**

FPAGP as the course promoter will forward PowerPoints or other information you wish to share with course registrants shortly following your Partner CEEvent. Your team can view the registration list from our website event module, and you can reach out to members through our website membership directory (viewable by your identified Partner representatives). Ideally, we record our Zoom Partner CEEvents, so as to allow those unable to attend to request access. Please advise in advance if your team does not want the presentation to be recorded or shared following the event.



REACH OUT TO US!

www.FPAofPhoenix.org | Admin@FPAofPhoenix.org

480.483.9035

MONDAYS! Join us for Hubbles, 11:30–12:30pm

FPAGP Zoom Room: <https://zoom.us/join>

Meeting ID: 710 131 6685 | Passcode: FPAGP