

Elevate the Profession that Transforms Lives through the Power of Financial Planning

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

Mission | We Connect CFP® and associated professionals to the resources they need and the people who need them.

Wednesday afternoons create a standing appointment for FPAGP! Valuable professional development options found here—fun, highly interactive connections delivering useful content. Online programs are scheduled through June of 2021, as listed below. Visit the chapter website events calendar or watch your email for RSVP links and monthly updates.

All events from 4pm—5:30pm MST, in the Chapter Zoom Room, unless noted otherwise.

Chapter programming rarely requests additional registration fees from Chapter Members.

Dues cover the base costs of arranging and hosting many core programming options.

Up to 18 hrs of CE, including up to 6 hours of Ethics CE!

January

- 13 **Community Conversation** | Craig Waugh
- 20 **Compliance CE** | Purposeful & Interactive INSURANCE Ethics | 4H of Ethics CE [\$0 member/\$95 nonmember]
- 27 **Partner CE Event** | 1H CE

April

- 7 **Community Conversation** | Dale Walters
- 14 **Partner CE Event** | 1H CE
- 21 **Partner CE Event** | 1H CE
- 28 **Shared Event** | w/East Valley Planning Council Case Study Team Challenge [7:30am–9am*]

February

- 3 **Community Conversation** | Michael Fischer
- 10 **Advocacy Day** | Advancing the Fiduciary Duty and Standard for Financial Planners in AZ 9am–1pm* Teams of CFP® Professionals join pre-arranged 15–30 minute Zoom chats with their legislators. Sign up before Jan 10 to include your legislators in the meeting outreach.
- 17 **Partner CE Event** | 1H CE
- 24 **Partner CE Event** | 1H CE

May

- 5 **Community Conversation** | TBD
- 12 **Partner CE Event** | 1H CE
- 19 **Workshop** | Dr. Moira Somers, author of "Advice that Sticks" | 11:30am–1:30pm*
- 26 **Partner CE Event** | 1H CE

March

- 3 **Online Happy Hour** | Focus on Your Social Media Skills | Facilitator: Russ Bucklew [\$25 nonmember]
- 10 **Partner CE Event** | 1H CE
- 17 **Town Hall** | Financial Literacy Expansion
- 24 **Partner CE Event** | 1H CE

June

- 2 **Online Happy Hour** | FPAGP Trivia Contest [\$25 nonmember]
- 5 **Pro Bono Event** | Financial Q&A for Teachers Via Zoom, time and details TBA
- 9 **Partner CE Event** | 1H CE
- 16 **Compliance CE** | CFP Board of Standards Ethics Course [\$45 nonmember]
- 23 **Partner CE Event** | 1H CE
- 30 **Partner CE Event** | 1H CE

* Listed times are subject to change. Please watch for our emails or check the FPAGP calendar for event updates and other details.

FPAGP Chapter Board meetings are generally the 4th Wed of every month from 12:30pm to 2pm

Start your week off right! HUBBLES Connect

No registration or RSVP necessary. Drop in whenever your schedule allows!

Connect with Chapter leadership and activities.

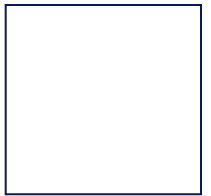
1st, 2nd, 3rd, 4th Mondays, 11:30–12:30pm | FPAGP Zoom Room | No charge for chapter connections (No HUBBLES on holidays)

CFP® Professionals pay annual dues of \$499 (less than \$42/month). When you scan these 6 months, is there one program option monthly that might be worth \$42 to you? ...also consider additional membership benefits like the popular disability plan, the new health insurance group plans, the Journal of Financial Planning, your media connections, and more. JOIN US!

FPAGP Zoom Room | <https://zoom.us/join> | Meeting ID: 710 131 6685 | Passcode: FPAGP

www.FPAofPhoenix.org | Admin@FPAofPhoenix.org | 480.483.9035

Platform descriptions on other side! 📄



INSIDE | 2021 Programming, Q1-Q2

**We wish you a
happy and healthy
holiday season.**

We can't wait to see you again!

Please note: Our office will be closed for the holiday week, 12/24 – 1/1.

FPAGP Professional Development Platform components
Beyond Continuing Education

Community Conversations | Jimmy Kimmel meets Chapter Members! A little humor, a lot of information, a glimpse into the life and path of a fellow community member.

Partner CE events | Our subject matter experts provide chapter members with 1 hour of focused deep dive content into their world and their view.

Workshops | Focus on skill development and hands on learning and practice. Different. Interactive. Fun! Useful.

Social Connections | Networking centric gatherings like Happy Hours, Joint events and mixers, Pre or Post event gatherings for debriefing and sharing.

Field Trips | Exploring physical locations relevant to components of Financial Planning. Past trips include the Federal Reserve, a series of mortuaries, several Senior Living Communities, and the Amazon headquarters.

Compliance CE | Qualified, and high quality, Compliance CE at affordable rates. Delivered at least twice annually through the chapter.

Town Halls | Bring a relevant and diverse set of stakeholders together for a planned, researched and moderated approach to identifying issues, creating opportunities, or solving problems.