FPA
FINANCIAL PLANNING ASSOCIATION
The Heart of Financial Planning™
of GREATER PHOENIX

Newsline

June 2008

A Gold Level Award Chapter for the Fourth Consecutive Year

JUNE ACTIVITIES:

Fri., June 13, 2:00 pm to 5:00 pm Friday Jam Session at Ameriprise Financial Advisors: 11811 N. Tatum Blvd, Suite 1030, featuring Susan Galvan discussing "HOLISTIC FINANCIAL PLANNING: TRANSFORMING CLIENT RELATIONSHIPS", 3 hours of CFP CEs. (No AZ Insurance CEs.) See Page 3 for details.

Wed., June 25, 11:45 am to 1:45 pm, Chapter Luncheon Meeting at the Orange Tree Golf Resort featuring Matthew J. Neubert and Julie A. Coleman of the Securities Division of the Arizona Corporation Commission discussing "Current Trends and Overview of Recent Arizona Corporation Commission Securities Division Cases." See Page 2 for details. Register at www.fpaofphoenix.org. Luncheon presentation followed by CFP Ethics session.

Wed., June 25, 2:15 pm to 4:15 pm CFP Ethics Session following luncheon meeting. You must register for Ethics separately at www.fpaofphoenix.org. See Page 12 for full information. The new Board of Standards, rules effective July 1, 2008, will be covered as part of this presentation. CFP Board's newly updated Code of Ethics takes effect July 1, 2008. Some changes add clarity; some changes reorganize the rules; some changes will have a profound impact on the practices of certificants.

A big THANK YOU to Todd Douma CFP® and Patrick Gavin, CMPS, CLTC, for their collaborative contribution to our Junior Achievement BizTown project.

Remember: From now through December, we will have our regular chapter meetings at the Orange Tree Golf Resort instead of the Phoenix Country Club while it undergoes major renovations. The Orange Tree Golf Resort is on 56th Street between Shea and Cactus.

NEW '08 PARTNERS! Please note our new '08 Partners shown on Page 4. Brad Sawyer of American Century Investments, David Wiener of CollegeInvest and Jeannean Sabatina of Heartfelt Care, LLC. Please welcome them on board and thank them for sponsoring our chapter! See Jeannean's message on Page 10.

THIS ISSUE - INDEX:

June 25 Chapter Meeting
11:45 am to 1:45 pm

Orange Tree Golf Resort

Registration 11:45 am
Lunch 12:00 pm to 12:45 pm
One Hour CE
CE Session 12:45 to 1:45 pm

CFP Ethics Session
Two Hours CE
2:15 pm to 4:15 pm

Come early and network with your colleagues starting at 11:30 am. Bring your business cards.

This program has been accepted by CFP Board of Standards for one hour of CE credit. Please bring your CFP license number to register. *(No AZ Insurance CE.)*

Current Trends and Overview of Recent ACC Securities Division Cases

We are pleased to welcome back Matthew Neubert, Director of Securities of the Arizona Corporation Commission, (ACC), and Julie Coleman, Chief Counsel of Enforcement at the ACC.

With only an hour of presentation time, they will be busy providing updates on the following topics:

- real estate and mortgage related fraud,
- affinity fraud
- fraud targeted at seniors
- dealer and investment adviser suspensions
- oil, gas and mining cases,
- Internet schemes

Matthew J. Neubert is the Director of Securities of ACC. He has also served as Director of Registration and Compliance and an Assistant Director of Enforcement for the Division. Matthew received his Bachelor of Arts degree from the University of Minnesota and received his law degree from Arizona State University. He has previously been approved as an NASD general securities principal, financial and operations principal and registered options principal. He is a member of the state bars of Arizona and Washington. He has served for many years on NASAA Broker Dealer Operations Committees and Continuing Education Project Groups. He currently is the Chair of the NASAA Broker Dealer Section.

Julie A. Coleman joined the Securities Division of the ACC in January 2005 and is presently the Chief Counsel of Enforcement. In addition to her management responsibilities, she continues to litigate a variety of proceedings under the Arizona Securities Act and Investment Management Act and participates in joint task force groups involving other state and federal regulatory and law enforcement agencies.

Prior to joining the Securities Division, Julie practiced for 14 years in the private sector as trail counsel for complex civil litigation matters and as a commercial transaction attorney. Julie is licensed to practice law in Arizona, Illinois, Wisconsin, New Mexico and before the United States District Courts for the District of Arizona and for the Northern District of Illinois, Eastern Division. Julie is a graduate of Marquette University Law School and received her undergraduate degree, with honors, from Loyola University of Chicago. She is pursuing a masters in taxation law.

The regulatory environment we work in makes it important to stay current and compliant. Please join us for this important update.

REGISTER ONLINE
www.fpaofphoenix.org

Luncheon/Education Session
12:00 pm to 1:45 pm

FPA members :	**$40**
1st time Non-member Guest:	**$45**
Repeat Non-member Guest:	**$55**

RSVP by 12:00 pm on June 20
Info: 480/483-9035

CFP Ethics Session
2:15 pm to 4:15 pm

FPA members :	**$45**
Non-member Guest:	**$55**

See Page 12 for Ethics Details

Friday Jam Session - Friday, June 13, from 2:00 pm to 5:00 pm. Three hours of CFP CE. Ameriprise Financial Advisors: 11811 N. Tatum Blvd, Suite 1030.(Enter on the north side of the building). Register by 12:00 pm June 9!

HOLISTIC FINANCIAL PLANNING: TRANSFORMING CLIENT RELATIONSHIPS

Holistic financial planning recognizes the human dimension of financial planning. Money touches every aspect of our lives, and the financial planner is the only professional who can work with the client to assure that financial resources are aligned with deep aspirations, core values, passionate purpose and personal legacy in a financial life plan.

What is **Holistic Financial Planning** and how is it different from the typical financial advisory service? The aim of holistic planning is to support the individual in envisioning, articulating and implementing a financial life plan **centered in what matters most**—whether that be time with loved ones, creative or spiritual pursuits, making a difference in the world, or passionately developing a career as a labor of love. The goal is to **thrive,** sustained by the enriching resources of a personalized plan and a collaborative relationship with a knowledgeable ally.

This Friday Jam Session will focus on the skills and tools that facilitate the rich discovery and implementation of what matters most to the client. Communication and relationship skills, applied to elicit values and vision, will be practiced in this experiential session. Participants will learn the basic steps for assisting clients in the integration of money and meaning in a life-centered, holistic financial plan by being both client and planner in a series of exercises.

Susan Galvan, owner of Galvanic Communications, LLC, has worked as a professional counselor, educator, trainer, minister and administrator. Co-founder of the Kinder Institute of Life Planning in partnership with George Kinder, CFP®, Susan brought all of her education and experience together as CEO and Trainer of Trainers in an innovative program to train financial planners and other professionals in Life Planning.

Co-author of *Lighting the Torch*, the first practical handbook on the life planning process, Galvan has also written numerous trade magazine articles, taught on three continents, and been interviewed numerous times by radio and print media. Susan has presented workshops at both local and national FPA gatherings, at the CFP Conference in Melbourne, Australia and the CFP Retreat in the UK. She is on the faculty of NAPFA University. As a member of the Life Planning Consortium, she participated in a joint research project on "Engendering Client Trust and Commitment" with the FPA, funded by a grant from the CFP Board.

We are excited to have Susan come to our chapter to share her extensive knowledge and creativity with us. Hope to see you June 13th!

This program has been accepted by CFP Board of Standard for three hours of CFP CE credit. Please bring your CFP license number. You must be present for the entire presentation to receive CE credit.
(No AZ Insurance CE.)

Friday, June 13, from 2:00 pm to 5:00 pm:
3-Hour Presentation/3-Hour CE Credits
Ameriprise at 11811 N. Tatum Blvd., Suite 1030
FPA Members: $25 Non-members: $35
REGISTER ONLINE BY JUNE 9
www.fpaofphoenix.org
Info: 480/483-9035

2008 CHAPTER PARTNERS

These sponsors support us. Please support them when possible!

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Advertising Rates

	1 issue	3 issues	6 issues	11 issues
Full pg.	$403	$1135	$1805	$2486
½ pg.	$207	584	937	1386
1/4 pg.	$115	327	517	772
1/8 pg.	$86	244	385	582

- **Call Jo Lynne Hutchinson at 480/483-9035 for information regarding full page inserts.**
- **Classified ad: $52 per issue for one-column inch, quoted per issue.**
- **Camera-ready artwork to be provided by 10th of the month prior to publication.**

2008 Enhanced Education Series! Passion, Vision, Connection

We look forward to your participation in 2008!

- June 25: Matt Neubert, Director of Securities, Arizona Corporation Commission. Followed by two-hour CFP Ethics Session.
- July 23: Bill Bengen, CFP®, Conserving Client Portfolios During Retirement
- September 24: Tom Giachetti, JD, Protecting Your Practice in an Ever-Changing Regulatory Environment
- October 22 Symposium: Ross Levin, Dick Wagner, Paul Johnson
- November 19: Robert Fleming, JD, Estate Planning Regarding Issue for the Elderly
- December 17: Steven Happell and Mary Ann Jennings, JD, Ethinomics

MEMBERS: WE NEED YOUR CORRECT E-MAIL ADDRESS. *Please e-mail us at info@fpaofphoenix.org so we can update this information in our database and get your newsletters to you! WE DO NOT SHARE YOUR E-MAIL ADDRESS WITH ANYONE!*

Second Annual FPA Golf Tournament – A Growing Success!

A 50% gain is nothing to sneeze at! That's how much this year's participation increased over last year's inaugural tournament. The golf outing was held May 14. The weather was perfect, the competition fierce and the feedback tremendous.

Final numbers are still coming in, but it looks like the gain in attendance will pale compared to the money raised. A good thing too, with the opening of Junior Achievement's Biztown II and its first ever Financial Planner Office just around the corner.

Have you had a chance to visit Biztown? Send a note to Beverly Bowers at Bbowers@miller-russell.com to learn how you can be part of history in the making.

"The tournament yesterday was great! My ladies all want to do it again next year. Between now and then, who knows, maybe I'll actually learn to play golf." Dana Anspach, CFP®

Golf Tournament continued on pg. 7

2008 FPA of Greater Phoenix
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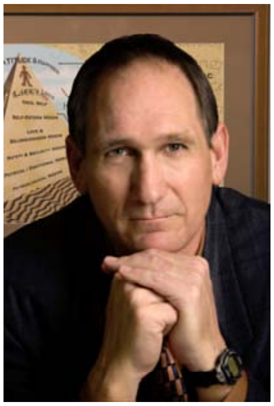

PRESIDENT'S MESSAGE

This month's meeting is all about regulations and ethics. Those imposed upon us by the Securities Division of the Arizona Corporation Commission and the CFP® Board of Standards. The two-hour ethics session will address the new standards that become effective July 1, 2008.

Rules and regulations serve as external motivations to maintain a minimum standard of ethical behavior. There are other motivations for ethical behavior and they begin with how we think, feel and act toward our fellow human beings.

I am reminded of the following passage, written by the poet, Mikhail Naimy, in 1962, and find it true today as the Internet flashes messages at the speed of light through fiber optic cable, bits and bytes.

> "So think as if your every thought were to be etched in fire upon the sky for all and everything to see. For so, in truth, it is.
> So speak as if the world entire were but a single ear intent on hearing what you say, And so, in truth, it is.
> So do as if your every deed were to recoil upon your heads. And so, in truth, it does.
> So wish as if you were the wish. And so, in truth, you are."

Granted, thoughts we do not speak or act upon do not have direct and measurable effects on our physical world but they do affect how we interact with one another. The subconscious mind senses all non-verbal communications and our thoughts do express themselves through our facial expressions and body language. Generally, we experience this in the form of gut feeling or intuition.

In April, Tom Connelly, CFA, CFP®, reflected on some of his past experiences where his judgment was clouded by conflicts of interests and where he likely did not make the best decision for himself and others. It takes a great deal of courage and self-awareness to honor your gut feelings when those feelings are telling you that something is wrong and you should not proceed in spite of the possibility of personal gain. It also takes wisdom to take a step back from situations in order to assess the best course of action when faced with moral and ethical dilemmas.

Whether you are a CFP® required to take two hours of ethics CE or an associated professional, it seems that maintaining high ethical standards is a necessity. All members of the FPA sign off on the Code of Ethics and this month's ethics CE offers you an opportunity to enhance your understanding of our Code of Ethics. I encourage you to join me.

Neal Van Zutphen, CFP®
President

Golf Tournament continued from pg. 6

Mark your calendars now for April 18, 2009, the date of next year's tournament. You will not want to miss this event. Join your FPA colleagues. Bring your clients!

And special thanks to our tournament team leader, Al Stockman, and his volunteers: Mike Watson, Jo Beth Mills and Kathleen Murray. Special thanks are in order for Sara Jayne White from Junior Achievement and the following sponsors that made the event possible:

Aquila Funds, Inc.
Phoenix Insurance & Securities School
First Command
Fidelity (major sponsor)
Keats, Connelly, Inc. (major sponsor)
Molinar & Co. Financial Advocates
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itSynergy
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Credit Union Financial Network
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Kensington Investment Group

WELCOME TO NEW MEMBERS

Welcome to the following new members of the FPA of Greater Phoenix. Some have been members in other chapters and transferred and are therefore new to us. We hope you are receiving materials from us and National, attending meetings, and receiving the benefits of your FPA membership.

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Kristy N. Vaughan
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AXA Distributors

Marcie Cragg
Brown & Brown Insurance

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Independent Planners Group

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Joy C. Cervantes, CPA
Joy C. Cervantes, CPA, P.C.

Todd Braeger
BNI Group

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Wealth Management Solutions

Brad Priebe, CFP®
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Leonard Kirk Jones
AXA Advisors

Richard Cartledge
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Glenn Gryka
Compliance Consulting

Christopher Lyding
AIG Retirement

Brada Panther
Heartfelt Care, LLC

Jeannean Sabatina
Heartfelt Care, LLC

William N. Cericola, JD
Benchmark Financial, Ltd.

NEW MEMBERS Continued on page 9

NEW MEMBERS continued from page 8

Jennie Gockel
Cambridge Wealth Management

Kathleen Giancana
Kutak Rock LLP

Lindsey Underwood
Raymond James

Travis L. Porter
Starwood Hotels & Resorts

Angela Paullin
Wells Fargo Home Mortgage

Patrick Peters, CSA
RSC

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Securities America

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Wachovia Securities

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Lohman Company, PLLC

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Ridenour, Hienton, Kelhoffer,
Lewis & Garth

Luanna R. Bayer
Homeowners Financial Group

Douglas D. Brown
Money Concepts

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David B. Knox, CPA, Ltd.

Andre Carman
Gallagher & Kennedy

Ashia Kinnaman
Mortgages, LTD

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WELCOME TO ALL OF THESE MANY NEWCOMERS!

HEARTFELT CARE, LLC
A NEW GOLD SPONSOR

Heartfelt Care, LLC, is an advocate for quality of life for individuals with cognitive and/or physical impairments. By providing sound advice and guidance regarding the immediate and long-term needs of an impaired person, we develop a plan for on-going care and placement (if required) that identifies all related medical, support, financial, legal, and other community-based services.

We also perform on-going care management services, which include coordination and constant monitoring of all providers and services, on-going communication of any issues or problems that arise, and intervention to ensure resolution and quality care. In this capacity, we serve as a buffer for the family and, thus, create the opportunity for the family to have more enjoyable, less stressful interactions with their loved one during such difficult times.

Additionally, we offer objective, third-party expert opinions, guidance, and testimony to the financial and legal communities in terms of a client's overall health and well useful in preparation for depositions, mediations and other court proceedings. In this capacity, we further strengthen your case research resources by evaluating current care plans, medical histories, and other documentation, and recommending an objective, holistic approach for moving forward in the best interest of the client.

While this is only a brief introduction, the services offered by Heartfelt Care may become increasingly important to you as you continue to support your long-term clients and extend your overall client base. In the event you begin to detect a change in physical behaviors or mental capacity (e.g., tremors, poor speech, lack of concentration, increased confusion, etc.), you now have another resource to leverage in order to better serve your clients – ideally before the onset of a crisis.

Please feel free to contact either Jeannean Sabatina (602.769.6843) or Brada Panther (623.261.3981), if you have any questions or would like to discuss our services in greater detail. Thank you and we look forward to working with you in the future.

Volunteers Knock Another Phone Bank Out of the Park!

"I received calls where you could tell it was a person with very little assets and very little income. Those made me feel pretty good when answering their questions as they truly needed our help." Timothy Fleming, CFP®

Many thanks and congratulations to our team of volunteers working with *The Arizona Republic's* financial planner call-in phone bank held on May 7, 2008.

The phones were ringing 15 minutes before show time and they never let up. In all, we answered 320 calls with untold numbers that did not get through. In addition to a great experience for our volunteers and information to the public, the publicity was tremendous! Three stories ran in the paper, introducing the volunteers and recapping some of the questions. Following the event planners were called directly for appointments and two television interviews.

"Last night was a great experience, fun, and exhausting! I think the phones would have continued ringing into the night. I would definitely love to participate in similar events in the future."

Supranee Lucas, CFP®

DATES and LOCATION for FPA of GREATER PHOENIX MEETINGS/ACTIVITIES

June 12, 2008	Best Practices Forum	Ameriprise offices on Tatum Blvd.
June 25, 2008	Chapter Luncheon Meeting—1 Hr. CE + 2 2 Hrs. CFP Ethics CE	Orange Tree Golf Resort
July 23, 2008	Chapter Luncheon Meeting	Orange Tree Golf Resort
September 12, 2008	Best Practices Forum	TBD
September 24, 2008	Chapter Luncheon Meeting	Orange Tree Golf Resort
October 22, 2008	Semi-Annual Symposium Ross Levin, Dick Wagner and Paul Johnson	Orange Tree Golf Resort
November 12, 2008	2 Hours CFP Ethics CE + Annual Social	Orange Tree Golf Resort
November 19, 2008	Chapter Luncheon Meeting	Orange Tree Golf Resort
December 17, 2008	Chapter Luncheon Meeting	Orange Tree Golf Resort
January 28, 2009	Chapter Luncheon Meeting	
February, 25, 2009	Chapter Luncheon Meeting	
March 25, 2009	Chapter Luncheon Meeting	
April 22, 2009	Chapter Luncheon Meeting	
May 27, 2009	Semi-Annual Symposium	
June 24, 2009	Chapter Luncheon Meeting	
July 22, 2009	Chapter Luncheon Meeting	
September 23, 2009	Chapter Luncheon Meeting	
October 28, 2009	Semi-Annual Symposium	
November 11, 2009	2 Hours CFP Ethics CE + Annual Social	
November 18, 2009	Chapter Luncheon Meeting	
December 16, 2009	Chapter Luncheon Meeting	

FPA RESOURCES :

National FPA Web site: www.fpanet.org
Phone: 1-800-322-4237
Fax-: 1-888-423-7329
FPA of Greater Phoenix Web site:
www.fpaofphoenix.org
Phone: 480/483-9035
Email: info@fpaofphoenix.org

FPA of Greater Phoenix

Mission: Facilitate the success of ethical and competent members who champion the financial planning process to help consumers make smart financial decisions.

Vision: To become and remain the premier source of professional development and CE education in the Valley by building competence, integrity, relationships and stewardship throughout the Chapter.

Registration for FPA of Greater Phoenix

1. Go online to www.fpaofphoenix.org
2. Select Meeting Registration
3. Complete the requested information including your VISA or MasterCard number and expiration date. You will immediately receive a receipt after submission.

If you register for a chapter meeting after the deadline, please be prepared to pay at the door by cash or check and a $5.00 late fee will be assessed. Also, at the door you must pay with cash or checks, NO credit cards.

OTHER ORGANIZATIONS

SFSP (Society of Financial Service Professionals) of Greater Phoenix: June 17 Hall of Fame Banquet, 6:00 pm at Orange Tree Golf Resort. Speaker Ken Gallacher, President-Elect of GAMA International. Non-members $75. Contact Karen Hanson for information, 480-991-5151 or phoenixsfsp@sfsp.net

FINANCIAL PLANNING ASSOCIATION

The Heart of Financial Planning™

FPA of Greater Phoenix Chapter
CFP-REQUIRED ETHICS COURSE
June 25, 2008
2:15 pm to 4:15 pm
Orange Tree Golf Resort*
56th Street between Shea and Cactus - Phoenix/Scottsdale

If you are renewing your CFP license with the CFP Board of Standards and need to fulfill your Ethics CE requirement, join us Wednesday, June 25, from **2:15 pm to 4:15 pm** at the Orange Tree Golf Resort. **Our next Ethics CE presentation will be in November '08 so get it now if you need to renew before then!**

The new Board of Standards rules effective July 1,2008 will be covered as part of this presentation.

	FPA MEMBERS	NON-MEMBERS
Cost for the Ethics CE session:	**$45**	**$55**

******Please don't call Orange Tree Golf Resort for information about the this session.*
Please call 480/483-9035 for information about FPA activities.

THIS CFP ETHICS SESSION IS UNDERWRITTEN BY:

Platinum Partner
Jack Lawless & Jill Hastings of
Pension Strategies
You can reach Jack at 602/957-7101

*****COME PREPARED ON June 25 WITH YOUR CFP LICENSE NUMBER*****

IF YOU PLAN TO ATTEND THE ETHICS MEETING,
YOU MUST REGISTER ONLINE BY 12:00 PM ON JUNE 20, 2008

www.fpaofphoenix.org