



^{OF} *GREATER PHOENIX*

What is the Financial Planning Association (FPA)?

Since 1988, the Financial Planning Association of Greater Phoenix has been the principal professional organization for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals, educators, financial services professionals and students in the Greater Phoenix area who seek advancement in a growing, dynamic profession. In affiliation with the Financial Planning Association® (FPA®), our chapter members adhere to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve. Through a collaborative effort to provide members with ONE Connection™ tools and resources for professional education, business success, advocacy and community, FPA and FPA of Greater Phoenix have become an indispensable force in the advancement of today's CFP® professional.

With a membership of approximately 400 members, FPA of Greater Phoenix, is a 501c(6) corporation offering a wide variety of personal finance advice from CERTIFIED FINANCIAL PLANNER™ (CFP®) practitioners and other professionals.

FPA for the Consumer

The FPA offers financial literacy services and resources through various websites and online tools. The resources on these sites are intended to help the public understand the importance of the financial planning process and the value of objective, competent, client-centered advice.

GENERAL PUBLIC

- Educate consumers about the benefits of financial planning.
- Offer guidance for different financial stages in life such as saving for college or to buy a house, getting married, starting a new career, or planning for retirement.

FPA PLANNER SEARCH – www.PlannerSearch.org

- An online search tool that connects consumers with highly qualified, ethical CFP® members of FPA in their geographical area.
- Consumers can search the database by asset and income minimums, planner specialty, and planner compensation models.

FPA PRO BONO PROGRAM - www.onefpa.org/advocacy/Pages/ProBonoProgram.aspx

- Targets low income individuals and families striving to build assets and improve their lives but cannot afford to engage a planner on their own.
- The FPA of Greater Phoenix works with community partners to provide financial planning to those in need.



^{OF} *GREATER PHOENIX*

FPA for our Legislators

The FPA strives to be at the forefront of legislative issues that protect consumers and promote the highest standards of professional conduct. The FPA government relations leaders and committees engage with federal and state regulators and lawmaking bodies to leverage a more unified voice for financial planning issues.

FINANCIAL PLANNING COALITION – www.FinancialPlanningCoalition.com

The Financial Planning Coalition is a collaboration of FPA, the Certified Financial Planner Board of Standards (CFP Board) and the National Association of Personal Financial Advisors (NAPFA) to advise legislators and regulators on how to best protect consumers to ensure:

- Financial planning services are delivered with fiduciary accountability and transparency.
- Congress produces legislation that puts the client interests first and enables consumers to identify a trusted financial adviser.
- The public understands the benefits of financial planners and values the services provided by them; views financial planning as a legitimate and accepted profession; and demands competent and ethical professional services provided by financial planners.

The current advocacy priorities are focused on:

- **Fiduciary standard** – support SEC rulemaking that would ensure that broker-dealers put customer’s interests first when they are giving personalized investment advice to retail customers.
- **Appropriate oversight of Investment Advisors** - Support more robust oversight of investment advisors by directing sufficient resources to improve current oversight programs.
- **Appropriate regulation of Financial Planners** – Educate policymakers about the practice and value of financial planning and the effect of policy decision on practitioners and their clients.

Chapter Facts

The Financial Planning Association of Greater Phoenix is a nonprofit organization whose members are individuals and firms promoting the financial planning process. Members of FPA of Greater Phoenix include CFP® professionals, insurance specialists, estate planning attorneys, accountants, bankers, other financial planning professionals and firms that provide products and services through financial advisors, and students.



OF GREATER PHOENIX

SOME INTERESTING FACTS ABOUT THE CHAPTER

- 71% are CERTIFIED FINANCIAL PLANNER™ (CFP®) practitioners
- 7% are Chartered Financial Consultants (ChFC)
- 7% are Certified Public Accountants (CPA)
- 3% are Chartered Financial Analyst® (CFA®)
- 3% are Personal Financial Specialist (PFS)
- 1% are Certified Investment Management Analyst (CIMA)
- 1% are Juris Doctors (J.D.)

WHO ARE FPA MEMBERS?

FPA's individual members include financial planners, many of whom hold the CFP® certification or are pursuing the CFP® certification. Other individual members include practitioners such as accountants, attorneys, bankers, charitable giving specialists, insurance agents, stockbrokers, money managers, investment consultants, broker-dealer and corporate executives, and others who champion the financial planning process.

Public Relations

If your publication or broadcast covers personal finance topics, consider the membership of the Financial Planning Association of Greater Phoenix as a source for your personal finance coverage. Many FPA of Greater Phoenix members can speak on a wide variety of personal finance issues including, but certainly not limited to, saving for retirement, funding college education, creating spending plans and do's and don'ts of estate planning. We understand the nature of deadlines and can provide experts in a timely manner.

Story Ideas

The Financial Planning Association of Greater Phoenix can help reporters formulate story ideas on a variety of timely topics. If you are interested in speaking to a member of the chapter to help you with a story or would like any further information, please contact Michelle Buonincontri at 516-818-4796.



^{OF} *GREATER PHOENIX*

Quick Reference Guide

FPA of Greater Phoenix Key Board Members

Jason Miller, CFP®; 2015 Chairman, Chair@FPAofPhoenix.org

Darin Shebesta, CFP®; 2015 President, President@FpaofPhoenix.org

Marcus Johnson, CFP®; 2015 President-elect, President-elect@FPAofPhoenix.org

FPA of Greater Phoenix Executive Director

Melissa Kemp, CFP®, ExecutiveDirector@FPAofPhoenix.org

Website: <http://www.fpaofphoenix.org/>

Headquarters:

In Care of Premium Organization

PO Box 4130

Scottsdale, Arizona 85261

Phone 480.483.9035

Fax 480.922-5283