



2024 Season
Drake Qualls, CFP®, President
Dam VanDusen, CFP®, President Elect
Steven Syrmopoulos, CFP®, Secretary
Dawn Noble, CPA, CFP®, Treasurer
Dale A. Walters, CPA, PFS, Chairman
Melissa Kemp, CFP®, AEP®, CAP®, CNAP®, Executive Director

Feb 22, 2024

Dear FPA Greater Phoenix Members,

After months of due diligence and planning by both chapter boards, we are excited to announce the proposed merger of the FPA of Greater Phoenix (FPA GP) and the FPA of Southern Arizona (FPA SA)! Both chapters have signed a Non-Binding Letter of Intent to explore merging into the “FPA of Arizona” (FPA AZ). The matter will now be put to a vote by members of both chapters.

Proposed Advantages of the Merger for Community Members:

- **Expanded Community:** A vibrant, statewide chapter providing members with more opportunities to interact with one another across counties and cities.
- **Amplified Advocacy:** Increased influence in Arizona legislature matters as well as federal advocacy efforts. We’ll have a louder, more unified voice for financial planners across the state.
- **More Professional Development:** - Increased access to learning and networking opportunities, offering greater convenience and frequency.
- **Consistent Guidance for Future Planners** – Act as the essential hub connecting students, prospective students, graduates, educators, and employers throughout our state.

As a current member of either chapter, here are some merger details you should know:

1. FPA GP’s bylaws will provide the backbone for the FPA AZ chapter.
 - a. Please send any comments to Drake Qualls or Trey Andrew, on/before 3/15/24.
2. All members as of 3/1 will be sent a ballot via email on/before 3/15/2024 to vote on the proposed merger.
3. [We will hold a \(virtual\) Special Meeting of the Members to complete any remaining voting and to tally and announce the result on the proposed merger by members, on 3/27/24.](#)
4. The anticipated effective date of the merger is April 1, 2024.
5. [2024 dues: Nationally, FPA will be increasing their dues starting April 1, 2024.](#)
 - a. FPA GP dues will remain the same.
 - b. FPA SA chapter dues must increase by \$10 to match FPA GP dues.
 - i. **All members are strongly encouraged to switch their membership dues payment option to “Auto Renew” either now or when/as they renew, to receive a 10% discount on their total FPA dues.**
 1. For FPA GP members, doing so will reduce your net dues by \$32.80 from your current payment amount.
 2. For FPA SA members, doing so will reduce your net dues by \$23.80 from your current payment amount.

A handwritten signature in black ink, appearing to read 'Drake Qualls'.

Drake Qualls, CFP®, President, FPA GP

A handwritten signature in black ink, appearing to read 'Trey Andrew'.

Trey Andrew, CExP®, RICP® President, FPA SA

FPA of Greater Phoenix
c/o Premium Organization
480-483-9035
admin@fpaofphoenix.org www.fpaofphoenix.org