

Greater Phoenix Board of Directors Call for Nominations

Call to Action - Actions Available to Interested Readers responding by 8/25/2023



Who to contact about this article: William Cerynik [Wcerynik@at-pw.com, (602) 732-4745]

More information can be found here: <https://www.fpaofphoenix.org/Board-Service-Info>

Additional Resources: <https://www.fpaofphoenix.org/page-1836796>

The Leadership Development committee of the Greater Phoenix Board of Directors seeks strategic thinking financial planning professionals and allied professionals interested shaping a successful future for our chapter.

If you answer many of the below questions “Yes”, please consider applying for the Greater Phoenix Board of Directors.

1. Can you tackle big, complex, thorny planning problems?
2. Would you like to hone your forward thinking, problem solving, obstacle reducing skills and match wits with others who may view things differently than you?
3. Does the exercise of learning and thinking make you increasingly humble?
4. Are you a firm owner or partner?
5. Do you keep your commitments?
6. Do you prefer to allocate your time and talent to organizations capable of making hard decisions and thus potentially making a difference in their wheelhouse?
7. Are you a current chapter member?

Trade Associations as a whole face multiple threats to their robust future survival, including:

- o Continuing Demographic Shifts: Retiring Baby Boomers giving way to new and emerging professionals who identify with shifting professional needs and personal values.

- o Technology Advances: Free accessible 24/7 continuing education limits chapters' odds of delivering CE as a high value proposition sufficient to incent professionals to leave their desks. What else do chapters offer?
- o Geography and Population Growth: Our Valley footprint is significant, as are the costs and hurdles to transiting it. Inducements to leave a desk to travel to a gathering face high hurdles.
- o Navigating an Industry Transition: Most chapter business models still seek primary funding from wholesalers while simultaneously courting financial planning professionals who value unbiased research.
- o Pandemic inspired behavioral shifts: Face to Face versus virtual connection options and the increased focus on health and well-being are re-framing highest priority allocations of our time and talent.
- o Communities of Choice and Priority: Balancing Family, Profession, and Self mandates purposeful vetting and painful choices between discretionary activities and community involvement. Professionals don't belong to, fund, and get involved in as many professional endeavors as in the past.

Will our chapter survive? Can we remain relevant? Can you help us succeed?

Context: Local FPA chapter leadership historically sought tactical support, not strategic thinking, for Board of Director positions. Greater Phoenix shifted to a Strategic Board of Directors just before the Pandemic.

Our chapter continues this surprisingly difficult transition via identifying and then placing visionary thought leaders in the boardroom while at the same time recruiting and supporting our community of volunteers in converting that vision into action through coordinated teamwork within a General Circle.

Side Note: Does the above referenced search for efficient teamwork also happen in your office?

If so – encouraging your team members to volunteer with the chapter could facilitate the evolution of your internal teamwork, through our purposeful Professional Development training and practice.

As you read this call to action, if you prefer to jump into action right away, and want to get involved, you can start by exploring our General Circle and Working Teams.

If this is a good time for you to become a more patient team player, a more purposeful communicator, a better manager or supervisor more adept at navigating the nuances of differing opinions amid strong personalities, then this is a great time to volunteer and get things done via our General Circle and Working Teams.

A healthy, stable chapter requires BOTH a high functioning Board and an effective General Circle.

-30-

Need more information/help on this topic?

Contact the chapter:

1. E-mail Admin@FPAofPhoenix.org,
2. Use the article Headline as the email Subject line,
3. Identify the information/help you are seeking in the body of your email.

Or call us! 480-483-9035



By **Craig Waugh**, posted on 7/20/2023 for news from 7/20/2023

An esteemed chapter Past President, you can find Craig at Greenberg Traug:
<https://www.gtlaw.com/en/professionals/w/waugh-craig>

Responsibility of:

BOD - Leadership Development Committee