

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.

JOIN US! As we transition to in-person events. 🤝 Some events will remain virtual 🖥️ and some will be offered as a choice of formats for your convenience.

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

All events from 4pm—5:30pm MST, unless noted otherwise. Events subject to change. Visit the [chapter website events calendar](#) for most up-to-date info. Watch for our Tuesday emails for RSVP links and other updates. **No Charge for most events:** Our programming rarely requests additional registration fees from Chapter Members. Dues cover the base costs of arranging and hosting many core programming options.

July & August

Escaping the heat? FPA Chapters in [San Diego](#) and [Orange County](#) welcome FPAGP members in July & August! Register now. They're expecting you!

- 7 🖥️ **Leadership Academy** | Hone your leadership & management skills through chapter involvement
- 14 🖥️ **Partner CEvent** | Zia Trust, Exploring Corporate Trusteeship, 1H CE
- 21 🖥️ **Compliance CE** | **AZ LIFE INSURANCE Ethics** 4H Ethics CE, 12:30-5pm \$0 mem/\$95 nonmem
- 28 🤝 **Field Trip** | U of A, North Phoenix Campus

Weeks of Aug 2 & 9 🤝🖥️ Join our Advocacy Team for 1-on-1 meetings with Federal legislators during their recess. See website for more info.

- 25 🤝 **Celebration!** | **New CFP Professionals & Externship Graduates**, 5-7pm, home of Russ Bucklew (Central Phoenix), all members welcome

September

- 8 🤝 **Workshop** | **Advocacy in Action**, Meet your legislators & learn how to effectively advocate, Anticipated Location: Arizona Capitol Museum
- 15 🤝🖥️ **Partner CEvent** | **Ashton Thomas**, in/near Kierland Quarter, 1H CE
- 22 🤝🖥️ **Partner CEvent** | **Cantor Fitzgerald**, 24th St & Camelback, 1H CE
- 29 🖥️ **Financial Planning Coalition Advocacy Day** | **National event**, local participation due to Virtual format, 8am-2pm

October

Estate Planning Awareness Month

- 6 🤝🖥️ **Partner CEvent** | TBD, 1H CE
- 13 🤝🖥️ **Special Event** | Discussion and Details in progress at print date
- 20 🤝🖥️ **FPAGP Annual Meeting of the Members** Location TBD
- 26 🤝 **Field Trip** | **AZ Treasurer's Office and State Board of Investment Meeting**, 12-2pm (approx.)

November

- 3 🤝 **Social Connection** | **NexGen Mixer**, 4-6pm
- 10 🤝🖥️ **Partner CEvent** | TBD, 1H CE
- 17 🤝 **Social Connection** | TBD

December

- 1 🤝 **Social Connection** | **Holiday Mixer**
- 8 🤝🖥️ **Partner CEvent** | TBD, 1H CE
- 15 🤝🖥️ **Town Hall** | **Funding Financial Literacy Education in Arizona**

2022

- J|12 Partner CEvent
- J|19 Community Conversation
- J|26 Partner CEvent
- F|02 State Advocacy Day
- F|09 INSURANCE Ethics Course
- F|16 FPAGP Symposium

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

Start your week off right! HUBBLES Connect

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

Connect with Chapter leadership and activities.

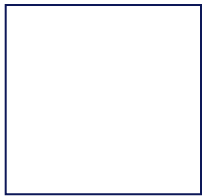
1st, 2nd, 3rd, 4th Mondays, 11:30-12:30pm | FPAGP Zoom Room | No charge for chapter connections (No HUBBLES on holidays)

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, Q3 | Q4 | ++

Coming soon...

**A return to face-to-face
gatherings.**

We can't wait to see you again!

FPAGP Professional Development *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 CEvents | 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 | CFP and Arizona licensed insurance professional Ethics. Quality instruction at affordable rates. Delivered roughly 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.

Pro Bono Events | Your opportunity to give back to our community through advocacy or volunteer hours.