



## An Open Invitation from the FPA of Florida



Matt McGrath  
CFP®

As I interact with members across the State, I'm constantly reminded of the PASSION our members have for financial planning. Part of the mission of the FPA of Florida is involving members in leadership training and development. In the past, it's involved the board members of the nine Florida chapters. However, considering how the economic events of the past year have called upon each of us to raise our level of leadership and performance, we've put together an empowering program and are making it available *to everyone, from staff to spouses.*

The 2009 Leadership Summit is October 21st though 23rd in Orlando at the Renaissance Hotel, Sea World. It begins with a half-day, preconference program where you'll connect with the National Leadership of the FPA and your peers from around the State as we focus on the "Future of the Profession." Days two and three feature "Mastering the Future," a fast-paced workshop designed to generate a quantum leap in your professional and personal life.

We are all confronted with today's challenges. To be successful in this climate, we are going to have to think in ways we have not yet thought and perform at levels we have not previously considered. Registration is open and seating is limited. Early-bird registration ends on September 18th, so register soon. Join us on one of the two upcoming conference calls with Mastering the Future course leader, Jonathan Clark, where you'll gain further insight into this program. I look forward to seeing you at the 2009 Leadership Summit.

### Take Some Time to Focus on Your Future

*Leader –  
a person who guides and inspires others.*

As a financial planner, through advice, planning and inspiration, you guide people toward their financial goals. Your access to being an effective leader directly impacts your success, and the success of others.

However, current economic climate makes it easy to get caught living at the effect of the circumstances we find ourselves in, often leading to a sense of having "one foot nailed to the floor." And while it may be obvious when clients get off track of their goals and dreams, it might not be so evident when you get side-tracked. What is clear is these unintentional detours could be leading you far away from what you are personally committed to;



ultimately thwarting your performance and negatively impacting your income. **People count on you being an effective leader.**

What breakthroughs might be possible for you guiding your clients if you designed a future for yourself that inspired and excited you?

What could be possible three years from now if you started with the first step of clarifying the future you are truly committed to?

**FPA of Florida Leadership Summit** is designed to open up thinking and explore new possibilities for the financial planning profession and more specifically, you. Your participation will provide you an opportunity to look at your future from a whole new point of view.

#### *Our Mission- PASSION*

*Promoting the benefits of working with a financial planning professional.  
Advocating on behalf of the financial planning profession.  
Serving as a resource to the citizens of Florida, elected officials and the media.  
Supporting FPA Florida Chapters.  
Involving members in leadership training and development.  
Organizing and coordinating as needs arise.  
Networking and connecting our members.*

### FPA of Florida Board of Directors

#### OFFICERS

##### President

Matt McGrath, CFP®  
(305) 448-8882 ext 206  
mmcgrath@evensky.com

##### President Elect

Paul Miller, CFP®  
(561) 362-0331  
pmiller@irfinancial.com

##### Chairman

Allen Arntzen, CFP®, CLU, ChFC  
(727) 538-0181  
allendarntzen@aol.com

##### Secretary

Claudia L. Sachs, CFP®, CCM  
(850) 210-0500  
claudia.sachs@prudential.com

##### Treasurer

Jean P. Larsen, CFP®  
(941) 408-0088  
jplarsen@verizon.net

#### DIRECTORS

##### Communications

Steve Athanassie, CFP®, AIF®  
(727) 772-9500  
sathanassie@trademarkcapital.com

##### State Regulatory Council

Paul Auslander, CFP®  
(407) 207-9006  
pauslander@afadvisors.com

##### Government Relations

Charlie Fitzgerald III, CFP®  
(407) 869-6228 ext 102  
Charlie@moisandfitzgerald.com

##### Director

Michael J. Zmistowski, RFC  
(813) 282-7200  
mzfp@aol.com

### FinancialPlanningFlorida.org

Diane Layton  
(407) 814-9905

or

Christine Brown  
(866) 730-4530

## Charles Fitzgerald, III Receives Heart of Financial Planning Distinguished Service Award

ORLANDO, FL Aug. 10, 2009 – The Financial Planning Association announced the winners of the fourth annual Heart of Financial Planning Distinguished Service Awards. The awards recognize those who contribute to the public and the financial planning community through their extraordinary work while demonstrating a commitment to FPA's Core Values: Competence, Integrity, Relationships and Stewardship.

Charles E. Fitzgerald, III, CFP® was one of four recipients of this distinguished award. Fitzgerald has been an FPA member since 1997. From 2002 through 2008, Charles served on the FPA of Central Florida Board in various roles, including President and Chair. He currently serves as chairman of the chapter's Government Relations Committee. Fitzgerald initiated the Florida Cooperative of FPA Chapters (now FPA of Florida) to give Florida chapter members a voice in state government. Through his advocacy work, Fitzgerald established strong relationships between FPA of Florida and the state government, and now serves on the statewide council.



The Heart of Financial Planning Distinguished Service Awards will be presented at FPA Anaheim 2009, the annual conference of the financial planning community, to be held October 10-13 at the Anaheim Convention Center in Anaheim, California.

### The FPA National Board and Staff Recently Participated in "Mastering the Future"

The FPA of Florida is very excited to make "Mastering the Future" a highlight of the 2009 Leadership Summit.

In August, the FPA national leadership team participated in this workshop and were asked for some feedback. Here's some of their comments:



*"The insights I gained during my participation in Mastering the Future had a profound impact on the way I envision my future with my family and other relationships including my co-workers and clients. The FPA Board and the profession will be hugely impacted by this program."*

*Mark Johannessen, CFP®  
National Board Chair*



*"Meeting Jonathan Clark and attending Mastering the Future were life-changing opportunities. I gained an entirely new and expansive way of looking at myself and the future possibilities for my relationships, and personal/business life. Exciting!"*

*Karin Maloney Stifler, CFP®  
National Board Member*



*"My participation in Mastering the Future enabled me to access and see new possibilities for transformation in my personal life and professional career. It inspired creativity and the courage to employ new concepts and new language in creating the future I want for myself."*

*Marv Tuttle, CAE  
Executive Director and CEO*

### FPA of Florida Leadership Summit 2009 October 21 through 23, 2009



**At the Renaissance Hotel Sea World  
6677 Sea Harbor Drive, Orlando, Florida 32821**

Call hotel directly for reservations at: 407-351-5555  
Ask for the FPA of Florida room rate of: **\$159 a night**  
Or visit: [www.FinancialPlanningFlorida.org](http://www.FinancialPlanningFlorida.org)

## Sponsor Spotlight

**Thornburg Investment Management** is headquartered in Santa Fe, New Mexico and advises bond funds, equity funds, and separate account portfolios for institutions and high net worth individuals.

**For more information, contact:**

**John Roche 239.289.5506  
jroche@thornburg.com**

Thornburg Investment Management  
2300 North Ridgetop Road  
Santa Fe, NM 87506  
[www.thornburg.com](http://www.thornburg.com)



**Gelbwaks Insurance Services** takes pride in their long term care education, product knowledge and service. They have an excellent support team of professionals, with many years of experience marketing, educating, selling and presenting on the subject of LTC throughout the country.

A 40-year old, nationally known, award winning company owned by *LTC Global*, they have contracted thousands of insurance brokers and financial professionals across the US. They are licensed in every state and are founding members of the *National LTC Network*, the largest LTC insurance marketing company in the nation. They look forward to supporting you and your company, as well as, your clients.

**For more information, contact: William (Bill) Dyess, CLTC  
954.236.9999 ext. 104 bill@gelbwaks.com**



## Preconference Half-Day Program – “The Future of the Profession”

Join members of the FPA national board, staff, industry experts and your peers for panel and group discussions followed by an early evening networking reception.

**October 21<sup>st</sup> Time: 1:00 pm – 5:30 pm**

No cost to attend the preconference program



## Conference Two-Day Workshop

### “Mastering the Future”

A fast-paced program built on three decades of experience in coaching and human development lead by

Coriolis Consulting Group President, Jonathan Clark

**October 22<sup>nd</sup> & October 23<sup>rd</sup>**

**Time: 8:30 am - 6:00 pm both days**

This workshop is regularly offered to the public at \$595

**Tuition: \$395 FPA members \$495 Non-members**

FPA members may bring up to five (5) non-member guests at the FPA member price



**Register by September 18th and receive an additional \$75 off**

***Don't delay – Seating is limited***

### Leadership Summit Preconference & Conference Registration Form

I will attend  Preconference Half-Day Program (no cost to attend)  
(check one):  Conference Two-Day Workshop (\$320 FPA Members, \$420 Non-members before September 18th)  
 Both

Name: \_\_\_\_\_ Company/Firm: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_

Current FPA Member:  Y  N FPA Chapter: \_\_\_\_\_

FPA members may bring up to five (5) non-member guests at the FPA member price. To receive the FPA member rate, please list guests below so we can link them to you as your guest. Additionally, please have each guest complete a separate registration form.

Non-Member Guest(s): 1. \_\_\_\_\_ 2. \_\_\_\_\_

3. \_\_\_\_\_ 4. \_\_\_\_\_ 5. \_\_\_\_\_

Payment Method: Check #: \_\_\_\_\_ Credit Card Type (circle one): VISA MC AMEX

Credit Card #: \_\_\_\_\_ Expiration Date: \_\_\_\_\_ Security Code: \_\_\_\_\_

Credit Card Billing Address: \_\_\_\_\_

Credit Card Authorization: X \_\_\_\_\_ Date: \_\_\_\_\_

*Three easy ways to register: By Mail, Fax or Online*

**1. Mail form to:**  
FPA of Florida  
2324 Orchard Drive  
Apopka, FL 32712

**2. Fax:**  
407-814-0929

**3. Online:**  
[www.FinancialPlanningFlorida.org](http://www.FinancialPlanningFlorida.org)

**Questions? Call 407-814-9905 or email: [Admin@FpaFla.com](mailto:Admin@FpaFla.com)**

2324 Apopka Drive  
Apopka, FL 32712

**Register by September 18th  
and save!**



[www.FinancialPlanningFlorida.org](http://www.FinancialPlanningFlorida.org)

Join “Mastering the Future”  
workshop leader, Jonathan  
Clark, for a live 45-minute  
conference call:

*“Being Effective in the Face  
of Economic Turmoil”*



September 2nd at 10:00 am or  
September 10th at 2:00 pm  
(eastern time)

RSVP to: [Admin@FpaFla.com](mailto:Admin@FpaFla.com)  
Or register at:  
[www.FinancialPlanningFlorida.org](http://www.FinancialPlanningFlorida.org)

### Meetings at State Capitol To Mark Financial Planning Week

The FPA of Florida will mark this event by sending representatives to Tallahassee on September 15th to secure a cabinet-wide resolution declaring October 5th through 11th "Financial Planning Week." This will be the sixth official visit to Tallahassee in the past three years.

Meetings are planned with representatives from the Department of Financial Services, the Department of Financial Regulation and the Department of Business and Professional Regulation. If you are interested in participating or would like additional information, contact Director of Government Relations, Charlie Fitzgerald (see front page for contact info). For further information on Financial Planning Week and how you or your Chapter can get involved, visit:

[www.FinancialPlanningWeek.com](http://www.FinancialPlanningWeek.com)



FPA of Florida Board members with CFO Alex Sink and Governor Crist after signing the 2007 Financial Planning Week resolution.

*We thank our professional partners for their support*

