



PASSION for FPA Stronger During Rough Times

The past year has certainly presented many challenges. We have all been helping clients stay on track in the midst of a challenging economic and financial landscape. Your elected representatives in the Financial Planning Association of Florida have been working diligently on your behalf, promoting the PASSION we all have for the financial planning profession.



Matt McGrath
CFP®

We continue to foster relationships with legislators and regulators through our grass roots networking in Tallahassee. We have positioned our organization as a resource to the State and its citizens in an on-going effort to promote the value of financial planning and the benefits of working with a financial planning professional.

We are organizing a Leadership Summit, slated for the first half October. Our goal is to provide Chapter members throughout the southeast an opportunity to share ideas and learn from fellow FPA leaders. Details will be announced soon and we hope to see you there.

In the meantime, please know we greatly appreciate your contribution of ideas in relation to how the FPA of Florida can fulfill our mission.

FPA of Florida
Leadership Summit
Coming Fall 2009
Watch for details

FPA of Florida Members Visit Officials in Tallahassee

On April 28th, leaders from the Financial Planning Association of Florida held meetings with officials from Chief Financial Officer Alex Sink's Office, the Office of Financial Regulation and the Department of Business and Professional Regulation. FPA of Florida representatives were introduced to House of Representatives during session and visited with House Representatives and their legislative assistants. Discussions were held regarding the regulation of financial planning by the SEC, abusive sales practices of variable and equity index annuities and taxation of financial planning services. The next trip to our State Capitol is planned for September.



Photo by Dorian Burr

FPA Members met with Florida CFO Alex Sink in April. From left to right: Jesse Goodson (Tallahassee), Greg Garrett (Tallahassee), Cathy Norris (Tampa), Claudia Sachs (Tallahassee), Florida CFO Alex Sink, Paul Auslander (Orlando), Charlie Fitzgerald (Orlando), Allen Arntzen (Tampa).

For additional details, visit our website at:
www.FinancialPlanningFlorida.org

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) 207-0106
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

Christine Brown
(866) 730-4530

Or

Diane Layton
(407) 814-9905

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For more information and their latest newsletter, visit their website at :
www.BroadandCassel.com



Scott Miller,
Partner
407.839.4207

smiller@broadandcassel.com



12157 W Linebaugh Ave PMB 312
Tampa, FL 33626-1732

FinancialPlanningFlorida.org



Above: Past President Allen Arntzen (left) is acknowledged for his service by 2009 President Matt McGrath (right).



Pictured from left to right: Jean Larsen, Diane Layton, Claudia Sachs, Matt McGrath, Allen Arntzen, Paul Auslander, Paul Miller, Charlie Fitzgerald at the FPA of Florida strategic planning meeting.

Our PSA is Coming to a Radio Station Near You

CPAs do it, attorneys do it, even dairy farmers do it. They all have PSAs.....so, why don't we?

The FPA of Florida is excited to announce our state-wide rollout of public service announcements on local AM and FM radio stations. In the coming weeks, you'll hear PSAs promoting the need for financial planning and the benefits of locating a planner through www.PlannerSearch.org. Make sure your contact information is up-to-date on this site and please share your success stories and feedback by contacting our Communication Director, Steve Athanassie, CFP, AIF (see Director list on reverse side).

We thank our professional partners for their support

