



**PASSION IS WORKING FOR ALL OF US ...**



Paul Miller, CFP®

Certainly the financial environment we are in has created new and ongoing challenges. It is our hope that FPA of Florida can work on your behalf to assist you in keeping clients on track.

We strive to promote the PASSION statement in all the work we do.

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. Just recently, we advocated for an element of Senate Bill SB2176 (Safeguard Our Seniors) which was signed into law by Governor Crist on June 1. The section of this legislation that we supported granted the Department of Fi-

ancial Services discretionary authority to remove the licenses of agents who had their licenses revoked by FINRA and other regulatory institutions. Our Government Relations committee is to be commended for this and their many other efforts in our state capitol.

We are organizing our 2010 Summit and Saturday Strategic Meeting on October 21-23 at the premier Rosen Shingle Creek Hotel in Orlando. Our goal is to provide Chapter Members throughout the Southeast with an opportunity to share ideas, learn from one another and listen to an excellent group of speakers. Please mark your calendars for this event. More information and details are forthcoming.

Once again, my personal thanks to all of our great sponsors this year, whose help has been especially appreciated. If any of you wish to become active with our Florida chapter, please give us a call...we always welcome your help.

**FPA of Florida Members Visit Officials in Tallahassee**

On March 23rd, leaders from the Financial Planning Association of Florida held meetings with officials from the Office of Financial Regulation, the Attorney General's Office and the Department of Financial Services. FPA of Florida representatives were also introduced to House of Representatives during session and visited with several House Representatives and their legislative assistants. Discussions were held regarding the regulation of financial planning by the SEC, pros and cons of the proposed "Safeguard our Seniors" legislation and any potential taxation of financial planning or investment advisory services. Please visit our website [www.financialplanningflorida.org](http://www.financialplanningflorida.org) for a complete write-up of the trip. The next trip to our State Capitol is planned for September.



**FPA Members** sit in the Cabinet Meeting Room. From left to right: Charlie Fitzgerald (Central Florida) Cathy Norris (Tampa), Claudia Sachs (Tallahassee), Allen Arntzen (Tampa), Paul Auslander (Central Florida).

**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.*

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**FPA of Florida**  
**2010 Summit**  
**October 21-23, 2010**  
**Rosen Shingle Creek**  
**Watch for details**

### FPA of Florida Introduces Our New Website!

Learn about our history, our Mission - our PASSION, read about the Government Relations Team recent trip to Tallahassee.

Our Events page highlights the most current Chapter event, and lists all chapter membership meetings. We've also included Industry Events sure to be of interest to you!

Visit [www.financialplanningflorida.org](http://www.financialplanningflorida.org) to see what we've done. Sign up on our website to receive valuable information on our upcoming trips to Tallahassee and our announcements on our upcoming 2010 Summit.

We welcome your feedback. Just submit your comments by completing the form under "contact us" on our website!

*We thank our professional partners for their support*

