



# ONE CONNECTION™ for CFP® Professionals

## About FPA

The Financial Planning Association® (FPA®) is the only professional organization for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals, educators, financial services providers and students who seek advancement in a growing, dynamic profession. FPA members adhere to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve and take part in FPA's One Connection™ for professional education, business success, advocacy and community at the national and chapter levels. FPA is truly an indispensable force in the advancement of today's CFP® professional.

With a network of more than 90 chapters, thousands of CFP® professionals and members at large, FPA provides access to local opportunities including:

- Continuing education and networking opportunities with professionals in their area;
- Study groups for those who are new to the profession and mentoring opportunities for experienced professionals; and
- Extensive tools, training, leadership, practice management and educational resources.

### Member Resources

- **FPA's Member Discount Program** is a comprehensive collection of products and services available at exclusive member-only rates. This program supports and enhances member's independent financial planning practices within five core areas, including Back-Office Support, Education and Training, Marketing, Insurance and Technology.
- **[The FPA Practice Management Center](#)** is a hub of tools and resources to help professionals start, grow or leave their financial planning practice.
- **The Virtual Learning Center** provides learning opportunities through live audio and Web-based presentations; allows members to ask questions of expert speakers; and earn continuing education (CE) credit.
- **FPA hosts a series of conferences** throughout the year that provide attendees opportunities to earn CE credit and network with like-minded professionals. FPA conferences include:
  - **FPA Retreat** – An opportunity to delve into the depths of financial planning and have discussions, which challenge deeper thinking and help set the direction of the profession. [www.FPARetreat.org](http://www.FPARetreat.org)
  - **FPA BE: Seattle 2014** – The largest annual gathering of the financial planning profession. [www.FPAExperience.org](http://www.FPAExperience.org)



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## About FPA

FPA is a leading voice on issues related to financial planning among legislators and regulators. Its efforts focus on highlighting the importance of competent and ethical financial planners in the delivery of financial services to consumers using the highest standards of professional conduct. FPA engages with federal and state regulators and legislators to advocate for policies to benefit consumers and financial planning practitioners.

### FPA's current advocacy priorities are focused on:

- **Fiduciary standard** – Support SEC rulemaking that would ensure that broker-dealers put customer's interests first when they are giving personalized investment advice to retail customers.
- **Appropriate oversight of investment advisers** – Support more robust oversight of investment advisers by directing sufficient resources to improve current oversight programs.
- **Appropriate regulation of financial planners** – Educate policymakers about the practice and the value of financial planning and the effect of policy decisions on practitioners and their clients.

In addition to its ongoing legislative and advocacy efforts, FPA participates in the Financial Planning Coalition ([www.FinancialPlanningCoalition.com](http://www.FinancialPlanningCoalition.com)) with key partners to advise legislators and regulators and inform their decisions.



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## The FPA Story

Since 2000, the Financial Planning Association® (FPA®) has been the principal professional organization for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals who seek advancement in a growing, dynamic profession. Through a collaborative effort to provide more than 23,000 members with One Connection to tools and resources for professional education, business success, advocacy and community, FPA has become an indispensable force in the advancement of today's CFP® professional.

To increase proficiencies, CFP® professionals must have access to the latest trends and information in financial planning, investments, risk management, estate planning, taxes, marketing, practice management and more. Access to these resources will help advance professional skill sets and knowledge while accruing valuable Continuing Education (CE) credits. FPA makes it easy for financial planners of all backgrounds and compensation models to learn and get their CE credits through highly-regarded conferences where the best minds in the profession gather to share insights and knowledge that make CFP® professionals more successful. The award-winning, peer-reviewed *Journal of Financial Planning*, a monthly publication distributed to every member, covers a wide-range of articles authored by a veritable “who’s who” in the profession. FPA chapters bring the opportunity to learn to the local level through a variety of educational programs, seminars and symposiums. To augment the in-person learning experience, FPA offers online webinars and programs to make gathering information and CE credits more accessible than ever before.

Creating a successful, profitable business takes time and a keen knowledge of the issues that dictate business performance. FPA offers a robust platform of business building tools and resources that directly add to members’ bottom lines. FPA provides CFP® professionals with research as well as online programs covering practical and cutting-edge guidance on financial planning and practice management. Combine all this with a healthy menu of member discounts and benefits on select services and products and access to PlannerSearch for referrals to new clients and you have a winning formula for operating a successful business.

Advocacy’s role in any professional association is designed to guarantee members are held in high regard at all levels. FPA gives CFP® professionals a powerful voice in ongoing deliberations about professional standards and potential laws that may impact those who provide financial planning services and investment advice. To that end, FPA is an active participant in the Financial Planning Coalition to ensure the combined strength of partner organizations is heard in matters within the federal government. FPA is also collaborating with state and chapter leaders to support the recognition and regulation of financial planners as trusted professionals. Our support will give members the ability to advocate within local and state government on issues that strengthen practitioner practices, and speak out on opposing issues that run counter to helping firms thrive. No other organization has the back of CFP® practitioners.



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## The FPA Story

One of the most profound benefits of affiliation in professional associations is the opportunity to learn, share and grow with fellow members. FPA facilitates and encourages sharing and camaraderie between members — in person and online. FPA's signature conferences include structured networking events to inspire discussion in and out of the classroom. The more than 90 FPA chapters around the country are in place to enable local connections through their respective programs and events. Virtual conversation is also provided through FPA Connect, an online community 20,000+ financial professionals. This is a powerful and convenient way to pose questions to your peers about best practices.

CFP® professionals of all backgrounds, compensation models and specialties can benefit from the One Connection™ offered by FPA. Whether they are searching for professional education, business success, advocacy or community, they will find it at FPA.



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## Quick Reference Guide

### FPA Leadership:

- Janet A. Stanzak, CFP® – 2014 FPA President
- Michael A. Branham, CFP® – 2014 FPA Chair
- Edward W. Gjertsen II, CFP® – 2014 FPA President-Elect
- Lauren M. Schadle, CAE – Executive Director/CEO

### Headquarters:

7535 E. Hampden Ave., #600  
Denver, CO 80231  
Phone: 800.322.4237

### Websites / Online:

- **General:** [www.OneFPA.org](http://www.OneFPA.org)
- **Journal of Financial Planning:** [www.OneFPA.org/journal](http://www.OneFPA.org/journal)
- **FPA Connect:** [connect.FPAnet.org](http://connect.FPAnet.org)
- **FPA on LinkedIn:** [www.linkedin.com/groups?mostPopular=&gid=114362](http://www.linkedin.com/groups?mostPopular=&gid=114362)
- **FPA on Facebook:** <https://www.facebook.com/FinancialPlanningAssociation>
- **FPA on Twitter:** <https://twitter.com/fpassociation>
- **FPA on YouTube:** [www.youtube.com/fpatelevision](http://www.youtube.com/fpatelevision)
- **FPA Practice Management Blog:** [practicemanagementblog.fpanet.org/](http://practicemanagementblog.fpanet.org/)

### Conferences:

Registration to these 2014 FPA events is complimentary for full-time journalists

- **FPA Retreat:** May 3–5, 2014 in Miami, Fla.
- **FPA BE: Seattle 2014:** September 20-22, 2014 in Seattle, Wash.



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## Executive Biographies

**Janet A. Stanzak, CFP®**  
2014 FPA President



Janet Stanzak, CFP® currently serves as volunteer president for the Financial Planning Association® (FPA®), the largest membership organization for CFP® professionals in the country, and includes many others who support the financial planning process.

Stanzak is principal and owner of Financial Empowerment, LLC in Bloomington, Minn. She has more than 26 years of experience in the finance industry and has been a member of FPA and its predecessor organization, International Association for Financial Planning (IAFP) since 1985. Stanzak has held several FPA leadership positions both locally and nationally including FPA of Minnesota president, director of member services and member of the public relations committee. She also served as chair of FPA National Leadership advisory group, chair of Chapter Leaders Resource Council (CLRC), chair of FPA Chapter Leaders Conference 2008, and chair of the 2008 FPA Communities of Interest advisory group. Stanzak also served as director of IAFP Orlando from 1988–2000.

Stanzak holds a Bachelor of Business Administration from the University of Wisconsin and also earned her Master of Science in Financial Planning.



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**Michael A. Branham, CFP®**  
2014 FPA Chair



Michael Branham, CFP®, currently serves as volunteer chair for the Financial Planning Association® (FPA®), the largest membership organization for CFP® professionals in the country, and includes many others who support the financial planning process.

Branham is a financial planner at Cornerstone Wealth Advisors, Inc. in Edina, Minn. where he interacts with clients daily on their retirement planning, income tax, cash flow and estate planning needs and also plays an integral role in implementing the firm’s investment portfolio strategies.

Branham has held leadership positions – including president in 2008 – with FPA NexGen, a national organization of young financial planners. Branham was a member of the FPA of Minnesota Ethics and Government Relations committee from 2001 to 2005 and served on the FPA of Minnesota Board of Directors from 2005 to 2008, including Director of Career Development. Branham also attended the FPA Residency Program, an intensive, one-week financial planning mentorship program, in 2004.

Branham attended the University of Alaska-Fairbanks and the University of Minnesota-Twin Cities.



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## Executive Biographies

**Edward W. Gjertsen II, CFP®**  
2014 FPA President-Elect



Ed Gjertsen, CFP® currently serves as volunteer president-elect for the Financial Planning Association® (FPA®), the largest membership organization for CFP® professionals in the country, and includes many others who support the financial planning process.

Gjertsen is Vice President of the financial planning and money management firm of Mack Investment Securities, Inc. As a CERTIFIED FINANCIAL PLANNER™ professional, he has been serving the financial planning needs of clients for over twenty years. He specializes in retirement planning, portfolio management and estate planning with a keen focus on clients becoming “financially organized.”

Gjertsen has served the profession as a past member of FPA’s Board of Directors. He is a co-founder of the FPA National Diversity Initiative and is past President and Chairman of the FPA of Illinois and received the chapter’s 2008 Heart of Financial Planning Distinguished Service Award.

Gjertsen is involved in community sports programs and has served on the boards of the Kenilworth/Winnetka Baseball Association, New Trier Trevian Pony Baseball program and is past President of the Lake Shore Feeder Baseball League. He graduated with a Bachelor of Science degree in Economics from Illinois State University and currently resides in Winnetka Illinois with his wife and two children.





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## Executive Biographies

### **Lauren M. Schadle, CAE** Executive Director and CEO



Lauren M. Schadle, CAE is the executive director and chief executive officer for the 23,000+ member Financial Planning Association® (FPA®). In this role, she oversees all of the organization’s member-focused operational and strategic efforts.

She has worked in the association and not-for-profit sector since 1989. Prior to assuming the CEO role in October 2012, Schadle had been FPA’s associate executive director and chief operating officer since 2006. She had joined FPA’s predecessor organization, the Institute of Certified Financial Planners (ICFP), in 1996 as its director of membership and marketing. Before joining ICFP, she worked for the National Professional Management Corporation, an association management company focused on serving the medical profession. She also worked at the California Medical Association, first for its for-profit subsidiary Physicians’ Advantage, and then subsequently led the overall marketing communication initiatives for the organization. In addition, Schadle served as public relations/media associate for New York-based Catalyst, a research and advisory firm.

Schadle received her Bachelor of Science degree in communications from Rutgers University and her Master of Science degree in marketing from the University of Colorado. She served as the 2011-12 president of the Colorado Society of Association Executives and served on the CSAE board through 2013. She is a member of the American Society of Association Executives and received her Certified Association Executive (CAE) designation in 2005.



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## FPA Resources for Journalists

- Online Press Room: [www.onefpa.org/about/PressRoom/Pages/default.aspx](http://www.onefpa.org/about/PressRoom/Pages/default.aspx)
- FPA members serve as expert sources on a variety of topics such as retirement planning, small business planning, family and marriage planning, and can also speak to client issues in a particular profession, or with different income and asset levels. Contact [PR@OneFPA.org](mailto:PR@OneFPA.org) to connect with a source.
- **Publications and research:**
  - FPA's award-winning *Journal of Financial Planning* features prominent writers and stories that enhance the knowledge and understanding of the evolving technical aspects of financial planning.
  - Grow your business with FPA's online Practice Management Center. Find the latest on office software, gain insight on marketing techniques, search human resources best practices or even changes to compliance. It's all here and even more: information on operations, building client skills and links to content from the leading experts of the day.
  - FPA's highly regarded Research Center conducts research to empower the financial services sector with knowledge and an understanding of the financial planning process, including how it affects consumers, planners and firms. [www.OneFPA.org](http://www.OneFPA.org)
  - FPA Press publishes some of the profession's most well-known titles, resource guides, handbooks, research studies and advice, including:
    - *Financial Intelligence: How to Make Smart, Values-Based Decisions with Your Money and Your Life*, by Doug Lennick, CFP®
    - *Conserving Client Portfolios During Retirement*, by Bill Bengen, CFP®
    - *Lighting the Torch: The Kinder Method™ of Life Planning*, by George Kinder, CFP® and Susan Galvan
    - *Oversold and Underserved*, by Marc S. Freedman, CFP®
    - *Financial Planning—The Next Step*, by Roy T. Diliberto, CFP®
- **The FPA Research and Practice Institute (RPI)** connects advisers to practice and business management insights to help them achieve business success. The RPI conducts original research on business-centric topics and issues, including operations, personnel, human resources, marketing and technology. Detailed analyses, reports, whitepapers and resources, based on the research, are made available to financial planning professionals to help them identify their business gaps and address them.
  - RPI's inaugural study - ***The Future of Practice Management*** - is now available. The study delves into the strengths, weaknesses and gaps in today's financial planning practice. **Access the study results [HERE](#).**



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## Contact FPA

If FPA can help you in your reporting, please let us know. Our communications team is eager to help. Please contact:

### **Ben Lewis**

Director – Communications and Public Relations  
Financial Planning Association  
7535 E. Hampden Ave., Suite 600  
Denver, CO 80231  
Direct: 303.867.7190  
Cell: 301.213.3252  
[BLewis@OneFPA.org](mailto:BLewis@OneFPA.org)

### **Theresa Jennings**

Communications Coordinator  
Financial Planning Association  
7535 E. Hampden Ave., Suite 600  
Denver, CO 80231  
Direct: 303.867.7309  
[TJennings@OneFPA.org](mailto:TJennings@OneFPA.org)