



Send application to KC@onefpa.org

FPA Knowledge Circle Host Application

Name: _____

Email: _____

Knowledge Circle: *(please check the one you are applying for)*

- Business Success Estate Planning International Investment Planning
- Retirement/Social Security Optimization Risk Planning Tax Planning

Please rate your skills in the areas below for the competencies/characteristics you would bring to this position. *Rate each area independently, with 10 being a very strong core competence and 1 being weak. Having more than one area with the same rating is ok.*

	A passion and solid understanding of the Knowledge Circle topic.
	A desire to connect with others and start conversations on the topic.
	Time and energy to devote to this effort. (5 - 6 hours/mo for hosts, 6 – 8 hours/mo for senior hosts, and 10 - 12 hours/mo for master hosts) <i>Please note, all people initially start as hosts.</i>
	The ability to connect the dots around FPA membership benefits – from understanding a concept to seeing how its implementation/adoption could positively impact a planner’s knowledge/practice.
	A strong network of fellow professionals who could serve as resources or community participants.
	Valuing/appreciating being seen as a leader on this topic.

What do you find most exciting about this opportunity?

Are you a practicing financial planner or do you serve in another role? _____

If you are a planner, does your practice have a specialty focus? If yes, what is it? _____

FPA Knowledge Circles Host Application (cont'd)

The role of host is about starting conversations, not answering questions. With that said, a certain level of knowledge is important. Please share the experience and expertise you have on this Knowledge Circle topic.

Have you written a blog? What social media outlets are you active in? _____

What other online communities are you part of? _____

What are your primary sources for professional development? _____

Attendance at FPA's annual conference (FPA BE: Seattle 2014) is an important part of this role. The Knowledge Circles will have in-person gatherings there. As a thank you to hosts for their efforts, a complimentary conference registration will be provided. Would you be able to attend FPA BE: Seattle 2014 Sept. 20 – 22?

While FPA's Core Values are encompassed in Competency, Integrity, Relationship and Stewardship, the organization's strategic focus is on the CERTIFIED FINANCIAL PLANNER™ (CFP®) professional and the concept of "one designation, one profession" in order to advance and grow the profession. Are these values and views that you embrace?

Help us get to know you. What are the ways you enjoy spending free time? _____

Is there anything else that you may bring to this position that would be good for us to know?
