



## **FPA NexGen 2015 Year in Review President's Message**

The past few years have been pivotal in the evolution of the FPA NexGen community, and 2015 is no exception. As the year comes to a close and we reflect on steps taken to move the community and the profession forward, I could not be more proud of the accomplishments of the NexGen leadership team and volunteers.

When the year began, we quickly realized that we needed to focus our energy on a few high-impact areas rather than setting out to achieve everything on our list – which could easily have included a hundred tasks! I am very excited that the NexGen community now has a strategic plan, which we believe will ultimately position FPA NexGen as THE community where young financial planners go to learn, connect, and engage!

The enthusiasm for the financial planning profession among NexGen members was seen throughout the year on both a national and local scale.



***FPA Retreat - Château Élan in Braselton, GA  
April 20-23, 2015***

NexGen secretary, Derek Lawson, was asked to be part of the FPA Retreat task force to make it clear that this conference is for *any* planner who wants in-depth experience and knowledge. Derek co-lead a “Wiser Together” world café session with Hannah Moore (a fellow NexGen member), and Elizabeth Jetton. Financial planners spanning multiple generations were able to share their experiences with each other so that we do not keep reinventing the wheel, but pass down the knowledge from generation to generation, while allowing the younger generation to teach those before them about everything that is new (and not just technology!). We hope to continue the “Wiser Together” concept at future FPA events.

***FPA NexGen Gathering – The University of Texas at Dallas, June 19-21, 2015***



NexGen also hosts our own annual conference, and 2015 was another record year for the FPA NexGen Gathering. Over 100 participants came together for an intense weekend of building community within the profession. Gathering is a truly unique conference because the agenda is not planned in advance. Rather, sessions are developed by participants onsite, helping to ensure relevant content and providing ample opportunities for intimate conversations throughout the weekend. Joe Pitzl, Cheryl Holland, and Patrick Dougherty facilitated Gathering, which also included a pre-conference offering four hours of continuing education credit. The issues covered at Gathering are not unlike those discussed on a broader scale within the profession, and while the majority of attendees are age 36 or under, we also welcome “mature” planners who provided valuable perspective and mentorship throughout the weekend. Space will be limited for the 2016 Gathering, so be on the lookout for announcements about registration!

***Gathering Scholarship***

First-time attendees are eligible to apply for the FPA NexGen Gathering Scholarship, which covers registration fees and up to \$500 of travel reimbursement. The scholarship began over five years ago at the conclusion of the Gathering conference. Attendees felt that they derived much more value from the conference than what it cost them to attend, and they began putting donations in the center of the room. Eventually, there was enough money to cover registration for a new attendee, and the scholarship was created. This tradition continues today.

This year we had a 27 scholarship applicants – the most ever – and we awarded four scholarships! The 2015 recipients were Aaron Clarke, Bryan Hasling, Cally Ingebritson, and J. Grant Mosher.

***FPA BE Annual Conference – Boston, MA  
September 26-28, 2015***



NexGen leadership has made it a priority over recent years to work with FPA to build and grow the NexGen presence at FPA BE. This year's conference was no exception, as it proved to be a great chance for people to build connections and relationships, particularly at the FPA NexGen reception sponsored by XY Planning Network. Furthermore, we continue to have representation on the conference task force, and Andrew Sivertsen, NexGen Chair, helped to ensure that there was not only relevant content for NexGen planners, but that NexGen speakers had a platform to share their successes. All NexGen related sessions were met with packed houses. It is exciting to see NexGen efforts helping to move the profession forward by establishing good quality training for young planners, and adapting service models to reach younger clientele.

***FPA NexGen Local Communities***

In an effort to better serve our local communities and organize the otherwise grassroots efforts on which FPA NexGen has been built, we created the role of NexGen Local Leader Liaison. Ian Harvey has fulfilled this role and provided local NexGen leaders with a point of contact within NexGen National. We currently have over 35 local leaders in communities across the country. Ian has worked with NexGen leaders to create a FPA NexGen Toolkit which documents best practices so new local communities can hit the ground running. The toolkit provides guidance regarding programming, working with your local FPA Chapter Board, working with sponsors, tracking members, where to reach out for assistance, and more. The NexGen Local Leader Liaison will play a pivotal role in helping us determine where NexGen is currently making an impact, which cities need more focused assistance from NexGen National, and how we can all help push NexGen forward by leveraging resources and sharing experiences.

***What's Next for NexGen?***

We already have big plans for NexGen in 2016, all of which support our primary goal of making NexGen THE community for young financial planners.

- Planning is underway for **FPA NexGen Gathering 2016**, which will be June 10-12 at The University of Texas at Dallas. Registration will be limited to 110 participants, and we expect the conference to sell out quickly. The conference facilitators and speakers for the continuing education pre-conference will be announced soon. Gathering 2016 will also include a unique opportunity for local NexGen community leaders to connect and share ideas. If you are interested in being part of the Gathering

Task Force, reach out to Rianka Dorsainvil, 2016 FPA NexGen President and Gathering Task Force Chair.

- In addition to a meeting of local NexGen leaders at the Gathering conference, we are working on other efforts to help **elevate local NexGen communities**. Ian Harvey, our local community liaison, is working on ways to better gather and share information about local efforts already happening across the country. He leads a quarterly conference call for local leaders to share best practices, and he will be providing resources to help facilitate conversations with FPA local chapter boards. We will also have a NexGen presence at Chapter Leaders Conference to better engage local FPA chapter leaders and executives. If you are interested in starting, or connecting with, a local NexGen community, please reach out to Ian.
- We are also taking significant steps toward **amplifying engagement** within the NexGen community. Two new volunteer positions will be created to support these efforts. A membership coordinator will enable us to proactively welcome new members into the community and to more regularly communicate with existing members. Additionally, a social media coordinator will help enhance our use of social media and the NexGen community within FPA Connect. Did you know NexGen has a twitter handle (@FPANexGen)? We are excited to reengage NexGen members in online conversation on a more regular basis. Please let me know if you want to get involved!
- Along with all these efforts, we will continue to have a strong NexGen presence at FPA conferences, including FPA Retreat and BE.

I want to encourage all financial planners age 36 and under to get engaged. NexGen is a group of passionate individuals who are eager to support one another in an effort to move the profession forward. FPA members who fit the demographic are automatically enrolled in the NexGen community on FPA Connect. Check your message board settings if you are not receiving the forum digest. Please join the conversation on Connect and social media. Get involved in your local NexGen community – or start a community, if needed. We are working hard to provide our membership with opportunities to get involved, and we hope to see you at Gathering or another conference event soon!

Thank you all for your support over this past year. I am proud of all our leadership team has accomplished, and I am excited about the future of NexGen and the leaders stepping up in 2016. Not only is NexGen the future of the profession, but our members are having a dramatic impact now. If you are not already involved, I promise you will not regret taking the first step toward getting engaged with your peers in the profession.

Sincerely,



Laurie Belew  
2015 FPA NexGen President

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