Should You Join FPA Nebraska?

"(Being a member of FPA) has provided me the opportunity to meet many great people as well as given me valuable insight with my own practice. Membership has allowed me to meet and share ideas with some of the best financial advisors in the state. Being part of this organization has allowed me opportunities to access both public exposure as well as members of the media."

— Jerry Egermier, CFP®
Omaha, NE

"I just had to renew my license for the Certified Financial Planner designation. When I received the e-mail from the CFP Board notifying me of the renewal requirement, I clicked on the link to learn what I needed to do. To my surprise — and delight — I learned I had already completed all of my CE credits, including those elusive Ethics Credits. The amazing thing was that I never sent one CE certificate to the CFP board. All of my CE credits were automatically filed…by virtue of my attendance at all of the Nebraska FPA educational meetings Those meetings provided more than the necessary CE credits to renew my CFP registration and to renew my insurance license with the State of Nebraska. How neat is that?"

— Dennis King, CFP®
LaVista, NE

"What I have valued the most over the years is the opportunity to participate in all day educational sessions six times per year with very experienced presenters. These educational sessions will help you stay on the cutting edge of financial planning plus provide both Nebraska state insurance and CFP® continuing education credits."

— Bob FitzSimmons, CFP®
Lincoln, NE

"I get asked a lot why an Iowa guy is member of the Financial Planning Association of Nebraska. The fact is, many of our relationships and our proximity to each other are interrelated. FPA of Nebraska even offers continuing education credits for Iowa insurance agents!"

— Scott Darrah, CFP®
Council Bluffs, IA

"Our industry is at a critical point in our maturation. We have inevitable changes in front of us, and an uncertain regulatory landscape. We must start thinking like a profession to gain control of our future. One core benefit of membership to the FPA is the advancement of our profession. We need professionals like you to help us uphold the standards we must have to become recognized as a profession."

— Mark Allen, CFP®
Grand Island, NE

FPA®
FINANCIAL PLANNING ASSOCIATION
The Heart of Financial Planning™

FPA

Financial Planning Association

The Heart of Financial Planning™

WHY JOIN?

• Access to networking and continuing education opportunities through the **Annual Conference & Exposition** as well as local association events. Targeted learning opportunities include FPA Business Solutions – the advanced practice management conference as well as an annual "Communities of Interest" conference.

• Gain support from industry leaders and your colleagues. Find a mentor — or be a mentor — through **Coach Match.** Talk to fellow financial planners at any time of day or night in the **FPA Café.**

• Online resources and tools through the new and improved FPA members/professional website, including access to marketing research, surveys, and trend analysis. Access **FPA MarketPlace** — the directory for financial planning products and services.

• Benefit from FPA's efforts to stimulate consumer media awareness of the value of financial planning and the profession. Celebrate the profession with **Financial Planning Week.**

• Maintain cutting-edge awareness of trends, products, and knowledge through the *Journal of Financial Planning,* the *FPA News Brief* newsletter, *Practice Management Solutions* (the profession's leading practice management magazine), the quarterly *Research Spotlight,* as well as publications from FPA Press.

• Free online training in the **Virtual Learning Center,** including access to archived sessions.

• Stay in compliance with the support and updates from the profession's top compliance experts. Plus, obtain free regulatory and licensing information.

• Gain access to practice management research and ready-to-use marketing and public relations materials, including templates for marketing brochures and newsletters.

• Attract new clients through the **PlannerSearch.org** referral service and by answering consumer questions through FPA's **Ask a CFP® Professional** e-mail hotline.

• Meet state credentialing requirements through live ethics sessions as well as self-study ethics programs.

• Have a voice in legislation affecting your work and your clients by supporting **FPA-PAC**— and stay informed of important legislative issues through **Capitol Update.**

• Get recognized for your work through **Financial Frontiers Awards** — honoring the profession's most innovative ideas — and the **Heart of Financial Planning Distinguished Service Awards.**

• Map out your career with customized career planning and the FPA Career Center.

• Give back to the community through pro bono and community outreach programs organized by FPA.

• Receive member discounts on products and services through FPA affinity programs. FPA also partners with AARP, the National Association of Women Business Owners and American Pharmacists Association.

"I ask that you take a few moments to consider your involvement with the membership organization of choice for financial planners, FPA."

— Mark Allen, CFP®
Grand Island, NE

www.fpanebraska.com

FPA

Financial Planning Association

The Heart of Financial Planning™

FINANCIAL PLANNING ASSOCIATION
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Individual Membership Application

Membership Categories (Please Select One)

Financial Planner	☐	$395	I am a financial planning professional that has actively practiced financial planning for more than five years, and agree to abide by FPA's Standard of Care.
Associated/Allied Professional	☐	$295	I am a professional who supports the financial planning profession or participates in the financial services industry but I do not hold myself out as a financial planner nor do I practice financial planning as my primary vocation.
	☐	+ $80 *(optional)*	I have the opportunity to purchase a CE subscription for an additional $80/year, providing 18 hours of CE credit annually, in order to maintain my designation if I so choose.

Please indicate your primary vocation: (please choose one)

__ Accounting Professional
__ Attorney
__ Banking Professional
__ Broker/Registered Rep
__ Professional Coach
__ Family Wealth counselor
__ Insurance Professional
__ Investment Manager
__ Business Succession Planning Professional
__ Real Estate and Mortgage Professional
__ Other (specify) ________________________

New to the Profession	☐	$225	I am a professional who has been in the financial planning industry for less than five consecutive years. Members can only be in this category for a maximum of five years and members who actively practice financial planning as their primary vocation agree to abide by FPA's Standard of Care.

I have been working in the financial services since ______ *(year)*

Faculty	☐	$145	I am an academic who spends the majority of my time teaching at an educational institution.
	☐	+ $80 *(optional)*	I have the opportunity to purchase a CE subscription for an additional $80/year, providing 18 hours of CE credit annually, in order to maintain my designation if I so choose.

Educational Institution ____ Subject taught ______________________________

Full-time Student	☐	$35	I am a full-time student. Members can only be in this category for a maximum of four years.

Educational Institution ____ Area of study ______________________________
Anticipated Graduation Year ___________________

Voluntary Contributions

Would you like to donate to the Foundation for Financial Planning, which supports providing pro-bono financial advice to those in need? ☐ Not at this time

Yes, I would like to donate the following amount: ☐ $25 ☐ $50 ☐ $100 ☐ $250 ☐ Other: _____________

Submit application and payment to:

Mail: 4100 E. Mississippi Ave, Ste 400
Denver, CO 80246

E-Mail: Membership @FPAnet.org

Phone: 800.322.4237
Fax: 303.759.0749

Contact Information

Full Name: ____
Last *MI* *First*

Phone: ___________________________ E-Mail: ____

Company: ____

Company Address: ____
Street Address Unit/Suite #

____
City ST ZIP

Billing Address: ____
Same as above? Street Address Unit/Suite #

☐ *Yes* ☐ *No* ____
City ST ZIP

Payment Details

Promotion Code: __________________

☐ Check (make payable to FPA)

☐Visa ☐ MasterCard ☐ American Express ☐ Discover

Membership Dues $______________________

Optional CE Package $______________________
(Allied/Faculty only)

Foundation Contribution $______________________

Total Amount Due **$**______________________

Total Amount Paid $____

Cardholder Name ____

Card Number ____

Expiration Date ____

Signature ____

Date ____

Terms and Conditions

FPA allocates a portion of your annual dues to supporting our chapters. Your local chapter may also assess additional fees for meetings and other educational programs.

Notice: FPA is required to inform you that $30 of your dues applies to a *Journal of Financial Planning* subscription. This is not deductible from your dues. Dues, contributions or gifts to FPA are not deductible as charitable contributions for federal income tax purposes, but may be deductible as an ordinary and necessary business expense. However, a portion of the dues is not deductible as an ordinary and necessary business expense to the extent that FPA engages in lobbying. The non-deductible portion of dues related to lobbying for 2009-2010 is 5.82 percent.

Disclosure

I, ____, agree to abide by FPA's Code of Ethics, and certify that:

(check one only)

☐ I have not been accused in writing, or found in violation of the code of ethics of any professional credentialing organization of which I am a member. A state or federal licensing or regulatory body has not censured, fined, or reprimanded me, or revoked, or suspended my investment adviser, securities, or insurance license(s). I am not a defendant in a civil or criminal lawsuit or arbitration. If a civil or criminal judgment or arbitration has been entered against me in the past, it has been disclosed to FPA or its predecessors.

OR *(check if any statements apply)*

☐ I have been accused in writing, or found in violation of the code of ethics of a professional credentialing organization of which I am a member. A state or federal licensing or regulatory body has censured, fined or reprimanded me, or revoked or suspended my investment adviser, securities, or insurance license(s).

☐ I am a defendant in a pending civil or criminal lawsuit or arbitration: or a civil or criminal judgment or arbitration has been issued against me that has not been disclosed to FPA or its predecessors.
Note: Disclosure of legal matters is not an admission of guilt. I will forward complete details and relevant documents to FPA in a timely fashion.
I understand that a finding of a violation or a judgment may create a presumption that I have violated FPA's Code of Ethics.
For a full version of FPA's Code of Ethics, please visit www.FPAnet.org/AboutFPA/Organization/CoreBeliefs/. For a full version of FPA's Standard of Care, please visit www.FPAnet.org/AboutFPA/Organization/StandardofCare/.

Signature ____Date _________

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