FPA
THE FINANCIAL PLANNING ASSOCIATION
OF MINNESOTA
The Heart of Financial Planning™

Minnesota Chapter
3900 Main Street NE
Minneapolis, MN 55421
Office (763) 781-1212
Fax (763) 226-2393

Web site: www.fpamn.org

Symposium 2008: Planning for Success
SPEAKER GUIDELINES

The Financial Planning Association of Minnesota's more than 840 members are a valuable audience: FPA members are key advisors to their clients and the relationship often endures for many years, sometimes spanning generations. The FPA of Minnesota membership collectively manages substantial investment assets on behalf of clients. Many FPA of Minnesota members are nationally known and active within leading professional groups and societies.

The Financial Planning Association is one of the largest, most active, and most sophisticated financial advisor groups in the country. The FPA of Minnesota is widely recognized as a leader in the financial planning community. The FPA of Minnesota has many years' history of producing top-quality educational programs featuring leading experts. Speakers are always evaluated by the FPA of Minnesota on how successfully they have met program educational goals, as well as by the positive response of the audience. The FPA of Minnesota has close ties with other large and advanced FPA groups and recommends successful speakers for their educational programs.

Keep in mind the following points about your presentation:

- The FPA of Minnesota is a professional organization; as such, a presentation at Symposium 2008 should be clearly and fundamentally educational and it should not be used as a forum for selling products or services. In addition, please avoid the promotion of any product or service during your presentation. Promotional and similar material may be made available to members before and/or after your presentation; or if an exhibitor, from your booth throughout the conference. Marketing or sales representatives from your organization should not be introduced to the audience. Rather, the FPA of Minnesota personnel running the Symposium will introduce them if appropriate.

- The FPA of Minnesota membership is diverse. It includes Certified Financial Planner™ licensees from small to large independent financial planning firms, others from investment, brokerage, banking, insurance, accounting, and law firms, and candidate CFP® licensees who are still in training. It also includes members who are not CFP licensees, but who possess similar credentials (e.g. CPA/PFS/ChFC) and allied professionals (e.g. attorneys) who are involved in financial planning in some capacity. Some members are generalists and provide advice on a wide range of financial planning issues, including investment, retirement, estate planning, taxation, and insurance. Many members specialize in one or a few of these areas. Your presentation should be tailored so that it is of value to all members, not just a narrow subset of them.

- Your presentation should provide accurate, unbiased, current, and relevant information. It should candidly address all "sides" - strengths and weaknesses, benefits and costs, pros and cons - so that FPA of Minnesota members can decide on their own how that information might be applied to better serve their clients.

Important Deadlines:

- **ASAP: Approximately 25-50 words and photo for publication in newsletters/brochures/online**
- **July 15th: Educational Timed Outline to be used for CFP and Minnesota CEU credits**
- **August 15th: Bio and introduction**
- **August 15th: Speaker Masters and Attendee Handout Masters (to be placed in attendee notebooks)**

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Symposium 2008: Planning for Success
SPEAKER CONFIRMATION FORM

Sponsor Name: ______________________________ Phone: ______________

Speaker Name: ______________________________ Phone: ______________

Date and Time: ______________________________

Title of Presentation: ____

Speaker Checklist:

☐ About 25-50 words for publication in newsletters/brochures and photo -- **DUE AS SOON AS POSSIBLE**

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☐ Educational Timed Outline to be used for CFP®, Minnesota CEU, and NASBA Approval for credits; **Due before July 15th**
Please submit using Educational Outline form included within your kit.

☐ Biographical Sketch and Introduction -- **Due by August 15th**
Please submit bio electronically to office@fpamn.org.

Suggested Speaker Introduction (to be given by representative of sponsoring company or FPA Board)

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☐ Attendee Handout Master to be placed in each attendee notebook; ONE master **due by AUGUST 15th. If you need additional time, call the FPA Office: 763-781-1212.** If you have no attendee handout, a syllabus will be created. Please forward all instructional materials, as we need to submit them for CE approval.

☐ Audio-Visual Equipment needs: ______________________________________

☐ Computer needs: ______________________________________
The material will be tested on our equipment and you will be contacted immediately if we encounter problems.

☐ Travel Schedule, Transportation, Lodging

- ☐ Attending the entire conference
- ☐ Will only be coming for my presentation
- ☐ Need transportation from/to the airport
- ☐ Already arranged transportation
- ☐ FPA of MN is responsible for one night's lodging at the Millennium for you, if you require.
  Night requested:______________________
- ☐ Your sponsor is responsible for your lodging and airfare. A special discounted rate is available at the Millennium Hotel this year. It is connected to the Minneapolis Convention Center by the skywalk.
  Link for Reservations - Code "symp8" - book early to ensure you get in on the reduced rates.

Authorizing Signature: ______________________ Phone Number: ______________________

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DUE BEFORE JULY 15th

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EDUCATIONAL OUTLINE FORM

Exact Name of Program:____

Speaker Name: ____

Subject Matter: (Circle your choice from following codes. You may select more than one category.)

A. General Principles of Financial Planning

B. Insurance Planning and Risk Management

C. Employee Benefits Planning

D. Investment Planning

E. Income Tax Planning

F. Retirement Planning

G. Estate Planning

Outline and Time Segments: *(If you need more space, use separate sheet of paper.)* Minutes per Segment:

A. ____ __________
1. ____
2. ____
3. ____

B. ____ __________
1. ____
2. ____
3. ____

C. ____ __________
1. ____
2. ____
3. ____

D. ____ __________
1. ____
2. ____
3. ____

E. ____ __________
1. ____
2. ____
3. ____

*This form must be completed in **addition** to the Speaker Confirmation Form.* ***DUE BEFORE JULY 15TH.***

Name and phone number of person qualified to answer questions related to speaker's presentation:

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Authorizing Signature: ______________________________ Phone Number: ______________________________