

## The Symposium Scholarship Student Application Sign Up Form

**2011 Annual Symposium: Planning for Success  
 October 24-25 - Minneapolis Convention Center**

**Instructions for the Scholarship Application**

A. **Eligibility:** *In order for one to be eligible for a full Symposium Scholarship, all of the following qualifications must be met.*

1. *Is admitted to a university or college as a full-time student*
2. *Demonstrates academic accomplishments; i.e., GPA and degrees received as well as professional and community involvement*
3. *Furnishes one letter of support from either a professor or a financial planning professional*
4. *Furnishes a statement - not exceeding one-page - indicating reasons they should be given a Symposium Scholarship*

B. **Submission Information:**

*Applications must be received by **October 1st** and scholarships will be awarded by **October 9th.***

*Forward to:  
 Financial Planning Association of Minnesota  
 3900 Main Street N.E.  
 Minneapolis, MN 55421*

***Limit of one scholarship per individual.  
 Recipient must attend Knowledge Cafés &  
 afternoon student programs (see schedule).***

Name:	Badge Name:
School Attending:	
Year In School:	Major:
Email Address:	Phone:
Address, City & Zip:	
Applying for: <input type="checkbox"/> Full Scholarship <input type="checkbox"/> Reduced Student Rate of \$100 <input type="checkbox"/> Check Enclosed <input type="checkbox"/> Credit Card Payment Online: <a href="http://www.fpamn.org">www.fpamn.org</a>	
Signature of Applicant:	Date:

**Students:** *This is a fantastic opportunity for you to network with financial planners. In addition, your resume will be included in approximately 500 attendee notebooks. Please forward it to [office@fpamn.org](mailto:office@fpamn.org) no later than **October 8th.***

# SYMPOSIUM 2011

Minneapolis Convention Center

Monday, October 24 - Watch for updates on the web

7:00-7:45 AM	Registration and Continental Breakfast
7:45-8:00 AM	Welcome
8:00-10:00 AM	Jack Surgent, Tax Related
8:55-9:15 AM	Visit Exhibits/Network
10:00-10:30 AM	Knowledge Cafe-Students & New Planners
10:00-10:30 AM	Visit Exhibits/Network
10:30-11:30 AM	Joel Weiner, Ethics, 1 hour
11:30-11:40 AM	BestPrep - Bob Kaitz
11:40-12:45 PM	Lunch and Networking with Exhibitors - Walk-n-Talk
12:45-2:45 PM	BO: Joel Weiner, Code of Ethics - 2 hours
12:45-1:40 PM	BO: Media Training, Mike Westling, Patty Dunn, & Kara McGuire
12:45-1:40 PM	BO: Karen Hansen, Estate Planning
12:45-1:40 PM	BO: Financial Essentials
1:40-1:55 PM	Visit Exhibits/Network
1:55-2:45 PM	BO: Kristin Kopp, Aging Wisely
1:55-2:45 PM	BO: Marketing Planner Panel
1:55-2:45 PM	BO: Financial Essentials
2:45-3:20 PM	Visit Exhibits/Network
3:20-3:30 PM	Minute to Shine and Announcements
3:30-5:00 PM	Frederick Jiang, Foreign Investment Management & Information
5:00-6:30 PM	FPA Reception in The Seasons - Socializing and networking

Photo shoot available on Monday!

Tuesday, October 25 - Watch for updates - [www.fpamn.org](http://www.fpamn.org)

7:15-7:50 AM	Continental Breakfast/Exhibits Open
7:50-8:00 AM	Welcome and Announcements
8:00-9:50 AM	Bill Bachrach, How to Build & Maintain Client Trust
8:50-9:05 AM	Visit Exhibits/Network
9:50-10:10 AM	Visit Exhibits/Network
9:50-10:10 AM	Knowledge Cafe - for Students and New Planners
10:10-10:20 AM	Minute to Shine and Announcements
10:20-11:30 PM	Craig Israelsen, Building a Better Core Portfolio
11:30-Noon	Lunch and Networking - Mezzanine Level
12:00-1:00 PM	Liz Ann Sonders, Economic and Market Outlook
1:00-1:30 PM	Cookie Break/Visit Exhibits/Network
1:30-1:40 PM	Minute to Shine and Announcements
1:40-2:35 PM	Amy Florian, Prepare to Meet Thy Boom
2:35-2:50 PM	Visit Exhibits/Network
2:50-4:50 PM	New Planners Panel - Financial Planning Essentials
2:50-4:50 PM	David Kelly, Jerry Webman, Rick Golod - Economist Panel
4:50-5:00 PM	Closing Remarks/Evaluations/Cert Forms

Targeted 12 CEs for CFP™, MN & WI Insurance, CIMA, NASBA plus 5 CEs for CLE!



Discounted Lodging Rates Available at the Millennium and Hilton hotels. View the web site for direct links.

Call on Pricing for Non-Member Group Rates for 5 or more.

Registration Rates: **Take \$100 off** Full 2-day rates if Registering By July 31st

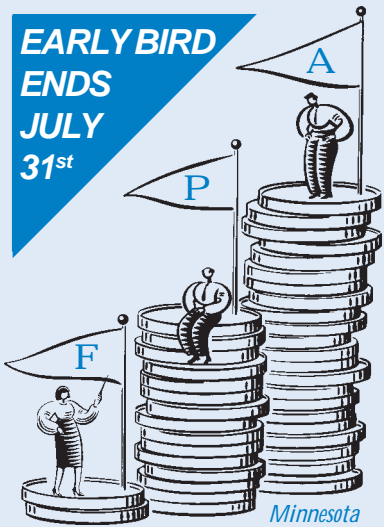
Members of Minnesota ..... \$175  
 Members of Other States ..... \$400  
 Non-Member ..... \$450  
 (For 10 Mbrs; \$270 Non-Mbrs  
 if registering by July 31st.)

**JOIN NOW**

For a refund, cancellations must be received in writing before October 1st.  
Return to FPA of MN, 3900 Main Street NE, Columbia Heights MN 55421

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**A Huge**

**“THANK YOU”**

to the Sponsors & Exhibitors  
who generously contributed to  
make this program possible:

**Platinum Partners**

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- Sit Mutual Funds
- Stonebridge Capital Advisors
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- BestPrep • Business AdvantEdge
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## Students:

*This is a fantastic opportunity for you to network with financial planners. Plus, your resume will be included in approximately 500 attendee notebooks. Please forward it by email to [office@fpamn.org](mailto:office@fpamn.org) before October 8th.*

## HAVE QUESTIONS? WE HAVE ANSWERS!

**INFORMATION:** To find the most up-to-date information on the program schedule, speakers, and exhibitors, go to the FPA of Minnesota's website: [www.fpamn.org](http://www.fpamn.org) and click on the Symposium tab.

### REGISTRATION FEES:

If awarded a scholarship, your only expenses are transportation and lodging. The scholarship includes attendance at all sessions, breakfast and lunch on both days, as well as refreshments and the Networking Reception.

**CANCELLATIONS:** If you must cancel, please call the FPA of Minnesota office: 763-781-1212.

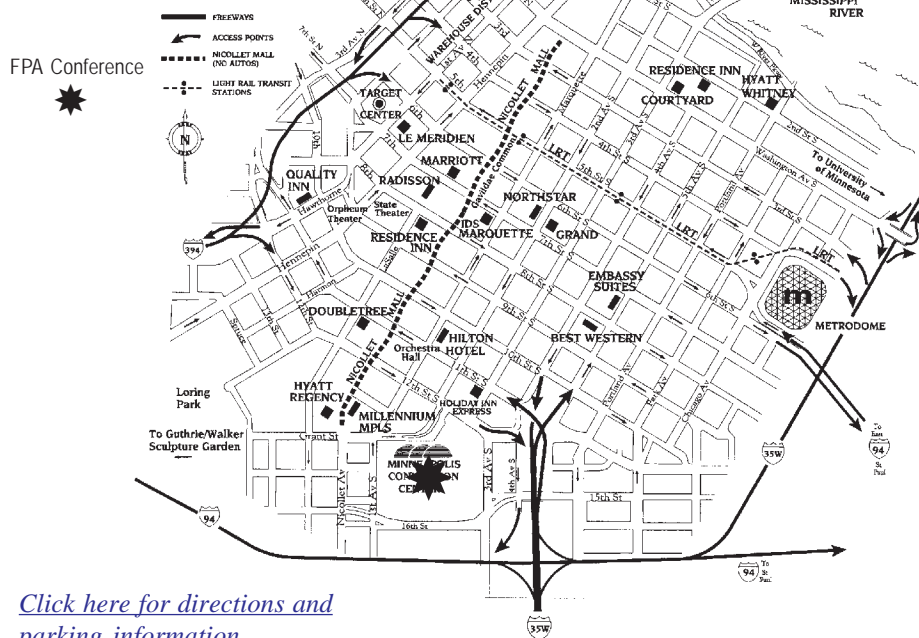
**LODGING:** Attendees are responsible for their own lodging arrangements. FPA of MN has secured special rates at the Millennium Hotel and Hilton Hotel. These hotels are connected to the Minneapolis Convention Center by the skywalk. Rooms are not guaranteed to be available after the room block has been filled so act quickly. Rates range from \$119-\$149. Discounted rates are available through: [Millenium Hotel](#) or [Hilton Hotel](#).

**ATTIRE:** The dress code is business casual. Keep in mind that weather in Minnesota during the fall is very unpredictable.

### QUESTIONS?

Please contact any of the Committee Members or Bonnie Stanley, Executive Director at 763-781-1212; or by email: [office@fpamn.org](mailto:office@fpamn.org).

## Directions to Downtown Minneapolis and the Convention Center



*The FPA of Minnesota  
appreciates and acknowledges the commitment and support  
of the Symposium Committee:*

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Office Connection

For more specifics, visit the FPA of Minnesota Website: [fpamn.org](http://fpamn.org)