

## *Three fantastic opportunities to promote financial literacy within your community!*

### #1: City Proclamation

FPA will celebrate its eighth annual Financial Planning Week during October 5-11, 2009. FPA's Minnesota Chapter, along with other FPA chapters across the country, will strive to promote the value of financial planning through a series of events during the week. A mayoral proclamation would be an excellent way to continue the declaration of an annual Financial Planning Week and promotion of financial literacy within your city. **Hats off to those promoting financial literacy in Year 2008: Governor Pawlenty, Brooklyn Park, Cloquet, Columbia Heights, Crookston, East Grand Forks, Erskine, Fertile, Mentor, Moorhead, Plymouth, Red Lake Falls and Saint Paul!**

### #2: Employee Benefits

To fulfill the organizational goal of promoting awareness of financial planning to the public, the association has hired professional writers to create articles that address the public's financial concerns. Sample articles include:

- In Troubled Times, It's Never too Early to Teach Kids about Money
- Resetting Your Recession-Era Budget? There May be Money in Places You Haven't Checked
- Why Maintaining Your Credit Score Becomes Even More Important During the Credit Crunch

These articles would provide a great source of information for your **City newsletters** - for employees and for the City residents. To view the articles, go to the website ([http://www.fpamn.org/Outreach\\_View/FinanceArticlesMedia.html](http://www.fpamn.org/Outreach_View/FinanceArticlesMedia.html)).

Research shows that employees benefit from broad-based financial planning education and need access to professionals who can help assure them that they are on the right track. Have you provided your employees with the tools they need to build a comprehensive financial plan that complements their life goals? Maybe you should consider a new (free) benefit – financial planning. Some individuals may not be ready to hire a financial planner, but that doesn't mean they don't have questions about money. Partner with FPA to help your employees discover the value of financial planning. Invite a financial planner in to speak to your employees.

### #3: City Meeting

FPA Members will come out to your city and hold a 45 minute meeting with your residents on financial planning. We will supply the speakers, equipment, and coffee. All we ask from you is a meeting room and screen.

#### Forging Your Financial Future:

- The Secret to Gaining Control of Your Finances
- What is Financial Planning and Who Needs It?
- Finding a Financial Planner
- Financial Planning Process
  - Step 1: Committing to the Task
  - Step 2: Developing Goals and Setting Priorities
  - Step 3: Assessing Your Resources
  - Step 4: Determining What is Needed to Reach Your Goals
  - Step 5: Developing a Strategy for Each Goal
  - Step 6: Refining Your Goals
  - Step 7: Incorporating Your Strategies into an Overall Plan
  - Step 8: Listing and Scheduling Action Steps
  - Step 9: Putting the Plan Into Effect
  - Step 10: Monitoring and Evaluating Results
- Forging Your Financial Future  
Question & Answer Period

### Who is FPA?

The Financial Planning Association (FPA) is a not-for-profit membership organization for the financial planning community. Its members are dedicated to supporting the financial planning process in order to help people achieve their goals and dreams. FPA believes that everyone needs objective advice to make smart financial decisions and that when seeking the advice of a financial planner, the planner should be a CFP® professional.

### ACT NOW!

**All it takes is a phone call to get your dates onto the calendar!** Schedule now so that you can include an announcement in the City newsletter and next employee publication.

Call 763-781-1212 and talk with Bonnie Stanley, Executive Director of the Financial Planning Association of Minnesota; or send an email to: [office@fpamn.org](mailto:office@fpamn.org).