

THREE SHOWS THREE SUCCESSES

Symposium 2001 CPA Conference Personal Investment Strategies Conference (PISC)



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Student Perspectives

As a senior at Minnesota State University, Mankato, I learned a great deal by attending the Symposium on Nov. 1st and 2nd. Soon I will be entering the work force and a lot was running through my mind while listening to all the speakers. Such questions as these I was asking myself. What other opportunities are there for me besides being an Advisor? Are there jobs available at mutual fund companies? What is fee-only advising like? Should I consider being a paraplanner?

As a student we are only familiar with the companies that come to recruit on campus, and most of them are just looking for sales positions. I was surprised to learn that there is a huge array of opportunities in the finance industry although we aren't exposed to them.

Coming out of four years of college I am looking for more financial security. I think it is tough for a twenty-two year old to start their own business as an advisor right out of college. So what other possibilities are there? That's what I'm trying to find out, and realized at the Symposium. There are many companies that are in the financial industry its just hard to land a job with them. Hopefully with networking and sending out resumes and cover letters I will find a job where my knowledge and experience can be some value to a company.

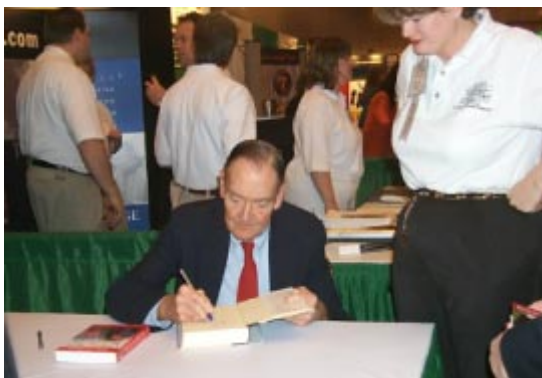
– Lori Fick, Student MSU

The FPA symposium was held on November 1 & 2 at the Minneapolis Convention Center downtown Minneapolis. Both days were planned exceptionally, and the service provided by the convention center was excellent. The three ring binders with power point slides and introductions of the speakers provided us all a helpful tool for taking notes and following along.

As a student of Finance in the financial planning track at Minnesota State University, Mankato, I found the FPA symposium beneficial for shaping my future plans. The speakers were very optimistic, and their advice about client relationships and building trust, not just selling products, was very appealing to me. Bill Bachrach's presentation on Value Based Selling gave all of us students a new and positive approach to financial planning. So many of the recruiters on campus have only talked about selling products, and it was nice to hear a new approach to maintaining and developing a clientele. The Value Based Selling book will surely be an asset to my future career in financial services.

I also enjoyed discussing career paths with other established financial planners from around the state and listening to all of the very knowledgeable speakers. The sum of all the presentations left us with a good picture of where the industry is headed and the importance of creating productive client relationships. On behalf of the students who attended the symposium, I would like to thank the FPA for the invitation and accommodations. It was truly a great experience.

– Lora Sjodin, Student MSU





Thank You to Volunteers for Ask The Planner!

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Thank You to Presenters!

Tom Taylor Howard Richards
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