FPA FINANCIAL PLANNING ASSOCIATION OF MINNESOTA

Minnesota Chapter
3900 Main Street N.E.
Minneapolis, MN 55421
Office (763) 781-1212
Fax: (763) 226-2393

Web site: www.FPAmn.org

The Symposium Scholarship
Student Application Sign Up Form

2013 Annual Symposium: Planning for Success
October 14-15 - 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 September 20th and scholarships will be awarded no later than October 1st.

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

Limit of one scholarship per individual. At a minimum, the recipient must attend attend the Buddy Meetup, the Social Media Panel, and the NexGen breakouts (see schedule).

Name:	Badge Name:
School Attending:	
Year In School:	Major:
Email Address:	Phone:
Address, City & Zip:	
Applying for: ☐ Full Scholarship ☐ Reduced Student Rate of $100 ☐ Check Enclosed ☐ Credit Card Payment Online: www.fpamn.org	
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 600 attendee notebooks. Please forward it to office@fpamn.org by September 20th.***

A Huge
"THANK YOU"

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

Platinum Partners

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Financial Planning Certificate Program

SYMPOSIUM 2013

Minneapolis Convention Center - Up to 14 Targeted CE Hours

Monday, October 14 - Watch for updates on the web

7:00-7:45 AM	Registration and Continental Breakfast
7:45-8:00 AM	Welcome
8:00-9:30 AM	**Michael Kitces,** Expanding the Framework of Safe Withdrawal Rates
9:30-10:00 AM	Visit Exhibits/Network
9:30-10:00 AM	**Buddy Program Meetup**
10:00-11:00 AM	**Dan Candura,** Understanding Fiduciary Duty *(MN Ethics CE)*
10:00-11:00 AM	Breakout: **The NexGen Town Hall Meeting**
11:00-11:10 AM	FPA MN President - Jason Plank, Membership & Benefits of FPA
11:10-Noon	**Kurt Czarnowski,** SS-Good Things Come to Those Who Wait...and Work
12:00-12:55 PM	Lunch and Networking - Visit Exhibits and Network
12:55-3:10PM	Breakout: **Dan Candura,** Ethics for Everyone
12:55-1:55 PM	Breakout: **Kurt Czarnowski,** Social Security: The Things Your Mother Never Told You
12:55-1:55 PM	Breakout: **Michael Kitces,** Latest Trends & Developments in Long-Term Care Insurance
1:55-2:15 PM	Visit Exhibits/Network
2:15-3:10 PM	Breakout: **Andy Schmidt,** What's All the Buzz About ETFs?
2:15-3:10 PM	Breakout: **Joe Larkin & Chris Burns,** Planning for Unmarried Couples
2:15-3:10 PM	Breakout: **Social Media Panel**
3:10-3:30 PM	Visit Exhibits/Network
3:30-3:35 PM	Minute to Shine and Announcements
3:35-5:00 PM	**Mitch Anthony,** Strengthening Relationships through Broadening Client Understanding
5:00-6:30 PM	FPA Reception in The Seasons - Socializing and networking

Photo Shoot Available

Tuesday, October 15 - Watch for updates - www.fpamn.org

7:15-7:50 AM	Continental Breakfast/Exhibits Open
7:50-8:00 AM	Welcome and Announcements
8:00-9:00 AM	**Jeff Lanza,** Non-verbal Communications: How to Hear What's Not Said
9:00-9:05 AM	FPA MN President - Jason Plank, Membership & Benefits of FPA
9:05-9:30 AM	**NexGen Meetup** - for planners 36 and under
9:30-11:20 AM	**Susan Smith,** Tax Planning in Light of New Tax Laws
11:20-11:25 AM	**BestPrep,** Bob Kaitz
11:25-11:35 AM	Minute to Shine and Announcements
11:35-12:30 PM	Lunch and Networking - Visit Exhibits and Network
12:30-1:30 PM	**Stuart Bear,** Three Constants in Estate Planning: Death, Taxes, and Dysfunctional Families
1:30-1:35 PM	Minute to Shine and Announcements
1:35-2:35 PM	**Stuart Bear,** New Considerations with Elder Law Benefits: It's Not Your Father's Oldsmobile Anymore
2:35-2:55 PM	Visit Exhibits/Network
2:55-4:50 PM	**David Kelly, Jerry Webman, Rick Golod** - Economist Panel
4:50-5:00 PM	Closing Remarks/Evaluations/Cert Forms
5:00 PM	**NexGen Reception**

Registration Rates:
Members of Minnesota FPA

STUDENTS: For Scholarships, please use application on Page 1.

-Day Rates: $230 Mbrs; $260 Non-Mbrs
(Rates INCREASE September 15th.)

JOIN NOW

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

REGISTER ONLINE

*Discounted Lodging Rates Available at the **Millennium**. Block is nearly full. Book Now.*

For a refund, cancellations must be received in writing before September 16th.Return to FPA of Minnesota, 3900 Main Street NE, Columbia Heights MN 55421

TOP 5 REASONS
TO ATTEND the 2013 SYMPOSIUM:

1 - You get <u>**GREAT**</u> Continuing Education Credits! **CFP Board CE, NASBA/CPA, CIMA, MN insurance, WI insurance** - approx. 12 hours each (including 3 hours of Ethics!) and **CLE CE** approx. 7 hours. CE will be submitted by 10/31/13.

2 - **Major League Speakers** for a minor league price - as low as $300 Early Bird!

3 - Each year, you will discover that your **highest sources of topics for client discussions** are the Symposium topics and monthly FPA Meetings.

4 - One of the best financial conferences in the country **right in your own back yard**.

5 - **Networking with the top financial planners and industry vendors** for new friendships and partnerships.

SYMPOSIUM - The place to be AND the place to be seen.

October 14 and 15, 2013
Downtown Convention Center
Minneapolis, MN

★ Annual Symposium ★

The speaker line-up includes:

Michael Kitces
Mitch Anthony
Stuart Bear
Jeff Lanza
Dan Candura
Kurt Czarnowski
Andrew Schmidt
Joe Larkin
Susan Smith
David Kelly
Jerry Webman
Rick Golod

Stay tuned …. more updates to follow in upcoming newsletters.

REGISTER

www.FPAMN.org

FPA of MINNESOTA PROGRAM SCHEDULE:

January 15, 2013 .... Annual Economic Overview, 7:30 am, GVCC
February 19, 2013 .... Solving Client Volatility, 7:30 am, GVCC
February 22, 2013 .... 7th Annual Career Day
March 19, 2013 .... Tax Planning in a High Rate Environment, 11:30 am, GVCC
April 16, 2013 .... Social Security Retirement and Taxation, 7:30 - 10:00 am, GVCC
April 16, 2013 .... Ethics for Everyone, 10:15 am - 12:15 pm, GVCC
May 21, 2013 .... Asset Allocation Post Financial Crisis, 2:30 pm, GVCC
June 18, 2013 .... Hour 1: The Role of International Investing; Hour 2: An Industry Group Overview in Global Investing, 7:30 am, GVCC
July 16, 2013 .... The Art of Post-Death Estate Tax Planning: A Real Life Story of Death, Taxes & Really Good Planning After Death!, 11:30 am, GVCC
August 12, 2013 .... Annual Golf and Bocce Ball Tournament, Island View Golf Club, Waconia
September 17, 2013 .... Hour 1: How to Prepare your Business and your Clients for the Upcoming Changes in Healthcare Reform & Hour 2: Financial Planning at the End of Life, 7:30 am, GVCC
October 14-15, 2013 .... Annual Symposium, Minneapolis Convention Center
November 19, 2013 .... Year End Financial Planning Tips: Three experts give you their insight, 7:30 am, GVCC
December 17, 2013 .... Understanding the 50+ Mature Marketplace, 2:30 pm - Allied Professional Mtg, GVCC

See Website for Details: http://www.fpamn.org/members/calendar.html

Students:

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HAVE QUESTIONS? WE HAVE ANSWERS!

INFORMATION: To find the most up-to-date information on the progam schedule, speakers, and exhibitors, go the the FPA of Minnesota's website: 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.

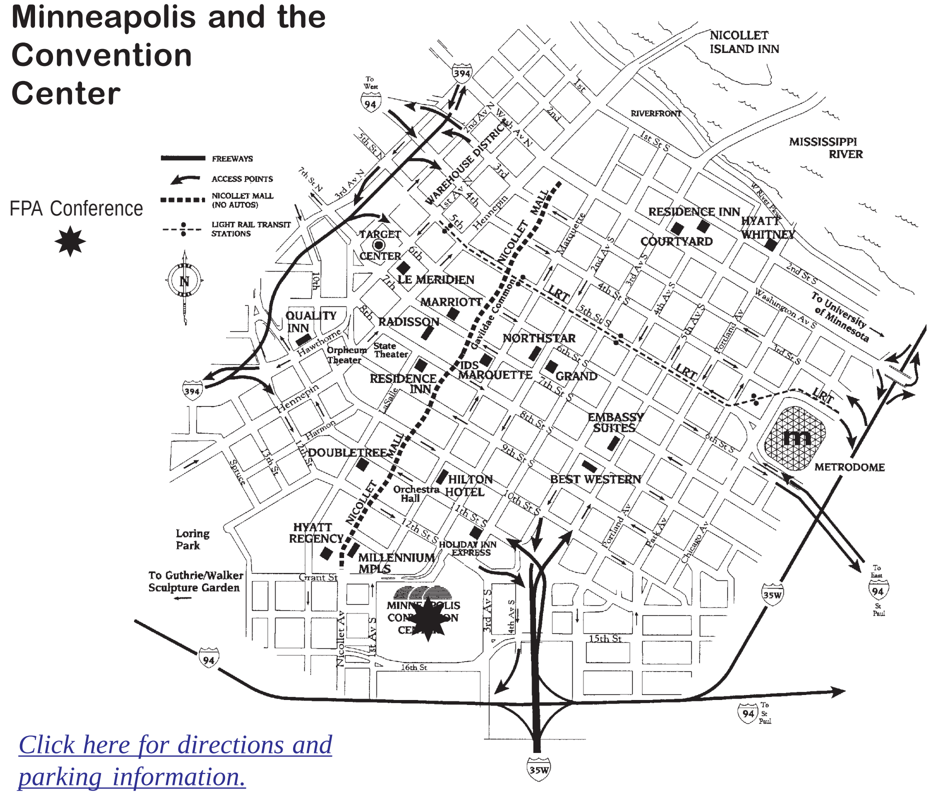
CANCELLATIONS: If you must cancel, ASAP, please call the FPA of Minnesota office: 763-781-1212.

LODGING: Attendees are responsible for their own lodging arrangements. FPA of MN has secured special rates at the **Millennium Hotel**. This hotel is 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 start at $149.

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

QUESTIONS?
Contact any of the Career Development Committee Members or Bonnie Stanley, Executive Director at 763-781-1212; or by email: office@fpamn.org.

Directions to Downtown Minneapolis and the Convention Center



[Click here for directions and parking information.](#)

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

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Office Connection & Send Out Cards

*For more specifics, visit the **FPA of Minnesota Website:** fpamn.org*