

2014 NexGen - Six Step Plan of Work



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Committee Members:

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FOSTERING TRUST

We will foster trust by...

- Supporting, advising and encouraging one another in our professional advancement
- Promoting, fostering and directing programs that aid in passing the baton.
- Exploring issues common to younger planners and seeking means of accentuating the positive and finding resolutions for the negatives

CREATING VISION

Our vision is to...

- Promote the vision of NexGen from the national level at the local level.
- To ensure the transference of wisdom, tradition and integrity, from the pioneers of financial planning to the next generation of our profession.

DEVELOPING STRATEGY

Strategy	Target Date	Committee Member(s) Spearheading	Critical Success Factors
Host collaborative and interactive meetings	All Year and Future	Chair	Positive feedback Increasing attendance
Strengthen the value of FPA membership at the NexGen level.	All Year		Member retention New Members
Increase the value of Symposium by targeting NexGen attendees.	October 2014		
Increase the number of NexGen members on FPA committees.	End of 2014 and ongoing		Build in younger members for continuation plans
Build consistent expectations and ongoing calendar of events.	End of 2014 and ongoing		

ENERGIZING ALLIANCES

Alliance	What do we want?	What do they want?
National NexGen leaders	Help and guidance	Strong local chapters
Career Development	Focus on appropriate events and groups	Assistance with vision and new opportunities
Membership	Highest NexGen attendance at local meetings	New members and member retention
Symposium	Breakouts with specific topics related to NexGen Members's interests.	Premier conference attracting an increasing number of attendees.

ACTIVATING TRANSFORMATIONS

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MEASURING PROGRESS, ACHIEVING RESULTS AND RESETTING THE VISION

Strategy	Monthly Report of Achieved Progress	Current Action Item(s)	Person Responsible (Alliances?)	Deadline for Action
Increase the number of members at NG events		Better promotion Calendar of events		July 2014
Align MN Symposium with National Conference: BE		Building to 3 breakouts currently and promote attendance.		October 2014