

## 2018 NexGen Committee - Plan of Work

FPA is the community that fosters the value of financial planning, and advances the practice and profession of financial planning.



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Vice:		

### Committee Members:

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### PASSION STATEMENT

The NexGen Committee creates opportunities for growth, education and networking for FPA MN members age 36 and younger, promoting the vision and mission of the both the national FPA NexGen group and the FPA MN chapter. The NexGen committee works to uphold and grow the community of NexGen within FPA MN membership with inspiration, encouragement and support.

Our vision is to...

- Promote the vision of National NexGen in MN: To ensure the transference of wisdom, tradition and integrity, from the pioneers of financial planning to the next generation of our profession.
- Continue to build the community of young financial planners, to provide support, guidance and encouragement to one another in our individual quests for professional advancement and personal development.
- Provide an opportunity for NexGen members to build leadership skills
- Be a valuable FPA member benefit for all members

### 3 MAIN STRATEGIES

As a guide, strategies are not specific projects.

<b>Strategy 1</b>	Build new relationships and strengthen the existing, within the FPA NexGen community
How will we communicate with our targeted audiences?	Engaged social media (including Connect), monthly chapter meetings, email announcements

Tactics to Fulfill Strategy	Target Date	Committee Member(s) Spearheading	Value that should be Communicated.
General Networking Events	Quarterly	Various	Value of FPA network (networking time) and building connections and relationships with peers in similar career stage as oneself
Topical Networking Events		Various	Provide a specific topic to guide discussions and spur new connections among NexGen members

NexGen Gathering Scholarship	June 2018	Various	Financially support a Minnesota NexGen member to participate in NexGen Gathering in order to broaden their engagement with national NexGen FPA members
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**Ways to Integrate Ideas and Collaborate**

How does what you do integrate with what other committees/organizations do?

Alliance	What can we provide?	What can they provide?
Career Development Committee	Facilitate a networking event the night before Career Day in February 2018 to introduce potential NexGen FPA members and current members.	The Career Development Committee provides the event to connect FP Students with our FPA members.

<b>Strategy 2</b>	To ensure the transference of wisdom, tradition and integrity, from the pioneers of financial planning to the next generation of our profession.
How will we communicate with our targeted audiences?	Social Media and emailed invitations to events

Tactics to Fulfill Strategy	Target Date	Committee Member(s) Spearheading	Value that should be Communicated.
Invite pioneers of financial planning to participate in panel discussions as part of an educational K’Nex event	April 2018	Various	The importance of learning from the professionals who have paved the way in our profession and provide an environment for seasoned planners to connect and share with NexGen members.

**Ways to Integrate Ideas and Collaborate**

How does what you do integrate with what other committees/organizations do?

Alliance	What can we provide?	What can they provide?

<b>Strategy 3</b>	Be an asset to all FPA MN members
How will we communicate with our targeted audiences?	Organize and sponsor educational events that bring both NexGen aged and other FPA MN members together

Tactics to Fulfill Strategy	Target Date	Committee Member(s) Spearheading	Value that should be Communicated.
Educational Events – K’Nex	Quarterly + 1 event at Symposium	Various	Value of FPA network, educational content (unique and relevant to the NexGen community), and an

		opportunity for NexGen speakers to present
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**Ways to Integrate Ideas and Collaborate**

**How does what you do integrate with what other committees/organizations do?**

Alliance	What can we provide?	What can they provide?
Symposium Committee	Provide content relevant to both NexGen and more experienced demographics to improve the Symposium value proposition for all attendees	Forum for NexGen speakers to present and express their viewpoint
Public Relations	Assistance with promoting NexGen events	Marketing of NexGen events
New Members	To grow the number of MN FPA NexGen members; to refer potential new members to New Members committee	Communicate availability of NexGen group to new young FPA members