



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

www.FPAmn.org
www.FPAMNSymposium.org

The Symposium Scholarship Student / Career Changer Application

2017 Symposium: October 16-17 • Minneapolis Convention Center

Instructions for the Scholarship Application

- A. Student / Career Changer 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 or is changing professions and does not have Symposium registration fees covered by their employer
 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, instructor, or financial planning professional
 4. Furnishes a statement - not exceeding one-page - indicating reasons to be considered for a Symposium Scholarship
 5. Furnishes a current resume
- B. Submission Information:**
 Applications must be received by **September 15th**. Applications received after the deadline are not guaranteed review and resumes may not be made available to Symposium attendees.
 Scholarships will be awarded no later than **September 30th**.

Submit Application to:
 Financial Planning Association of Minnesota
 3900 Main Street N.E.
 Minneapolis, MN 55421
office@fpamn.org

Limit of one scholarship per individual. At a minimum, scholarship recipient must attend the Buddy Meetup and NexGen Town Hall session (see schedule).

Name:	Badge Name:
School Attending or Profession Transitioning From:	
If Student, Year In School / Major:	
If Career Changer, time in transition / financial planning education coursework or licensing:	
Email Address:	Phone:
Address, City & Zip:	
Applying for: <input type="checkbox"/> Full Scholarship <input type="checkbox"/> Reduced Student Rate of \$100	
Signature of Applicant:	Date:

Applicants: *The Symposium is a fantastic opportunity to network with financial planners. Additionally, your resume will be made available to approximately 650 attendees. Please submit your application and resume to office@fpamn.org by September 15th.*

Students / Career Changers:

The Symposium is a fantastic opportunity to network with financial planners. Additionally, your resume will be included in the Symposium online portal and attendee notebooks. Please submit your application and resume to office@fpamn.org by September 15th.

HAVE QUESTIONS? WE HAVE ANSWERS!

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

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 \$124. See [Lodging tab](#) for additional details.

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

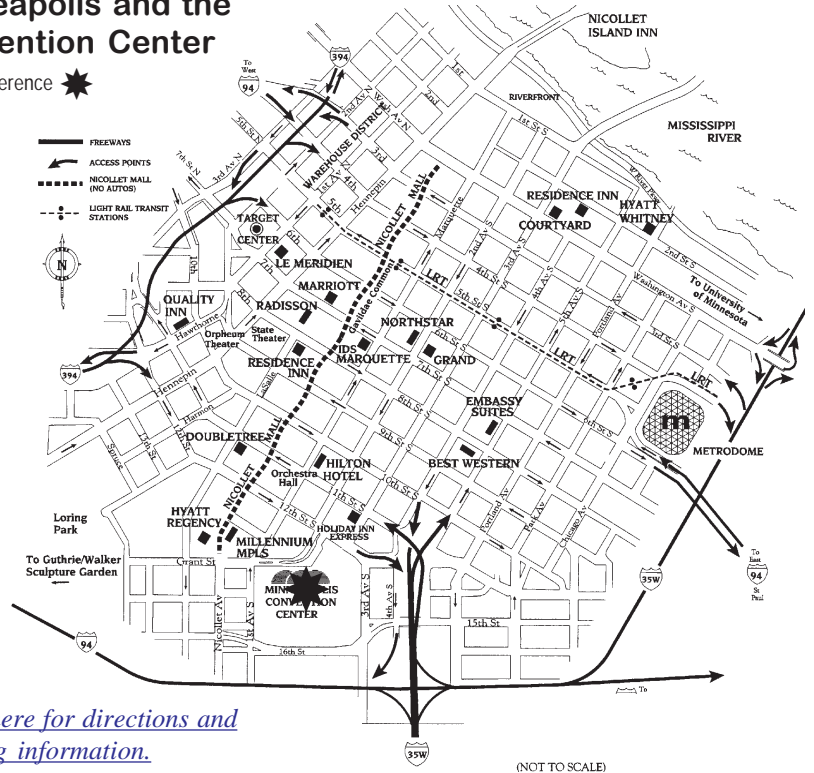
QUESTIONS? Email or call:

Megan Olson, Career Development
Director: 952-548-3321
meganolson8@gmail.com

Bonnie Stanley, Executive Director at
763-781-1212; bonnie@fpamn.org.

Directions to Downtown Minneapolis and the Convention Center

FPA Conference 



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

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

Director of Symposium 2017

Rachel Infante, CFP®

952-944-8250 • Fure Financial

Nick Augustin
262-385-2147
Mindful Asset Planning

Jim Buchanan
952-853-1235
Appletree Financial Network

Charles Buck, CFP®
651-330-3585
Buck Financial Advisors

Rob Caverly
651-335-9416
Bond & Devick Wealth Partners

Kim DeBaere, CFP®
612-373-4242
Bremer Wealth Management

Jeff Drayton, CFP®
612-916-6428
Thrivent Financial

Craig Jergenson, CFP®
763-445-2784
Coach Craig Jergenson, CFP®

Art Lundgren
612-250-9635
Lake Country Financial Planning

Trisha Qualy
612-347-7807
AdvisorNet Wealth Management

Julianne Schroeder, CFP®
952-829-0000 x 6166
USAadvisors Wealth Management

Deirde Van Nest
952-451-0172
Accelerated Performance

Bonnie Stanley, Executive Director
Jessica Hawthorne, Assistant Director
(763) 781-1212, office@fpamn.org
Office Connection

FPA of Minnesota Symposium Website: fpamnsymposium.org

TOP 5 REASONS

TO ATTEND the 2017 SYMPOSIUM:

- 1 - **Best-value conference** for quality education and networking: **Ready-Set-Grow!**
- 2 - **Advanced planning and practice management** tracks to enhance specialized knowledge
- 3 - **Empower your practice** - learn from the nation's top experts
- 4 - Meet **like-minded professionals** at this top-rated conference
- 5 - Earn **GREAT** Continuing Education Credits! **CFP Board CE, NASBA/CPA, CIMA, CLE, MN and WI insurance** - up to 14 hours (including up to 3 hours of Ethics!) CE will be submitted within 10 days.

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



FPA of MINNESOTA PROGRAM SCHEDULE:

February 21, 2017	.....	Hr 1 - Q& A with Neel Kashkari, 7:30 am, GVCC Hr 2 - Why Minnesota Can Work for Investors with Mark Henneman
March 21, 2017	.....	Roth Conversions & Social Security with Michael Kitces, Chapter Meeting, 11:30 am, GVCC
April 18, 2017	.....	Joint meeting with EPI, HR 1 - The Psychology of Owner Exits with Kalli Matsuhashi Hr 2 - Exit Planning: A Guide to the Process with Dyanne Ross-Hanson, 7:30 am GVCC
April 18, 2017	.....	Ethical Challenges II 2017, Special Ethics Session with Dan Candura, 10:15 am, GVCC
May 16, 2017	.....	The New Fiduciary Landscape with Mercer Bullard, Chapter Meeting & Social, 2:30 pm, GVCC
June 20, 2017	.....	Reverse Mortgages, Chapter Meeting, 7:30 am, GVCC
July 18, 2017	.....	Advising Clients through the Toughest Times of Life with Amy Florian Chapter Mtg, 11:30 am GVCC
August 7, 2017	.....	18th Annual Golf & Bocce Tournament, Midland Hills Country Club, Roseville, MN
September 19, 2017	.....	Planned Giving, Chapter Meeting 7:30 am, GVCC
October 16-17, 2017	.....	18th Annual Symposium, Minneapolis Convention Center
October 28, 2017	.....	Financial Planning Day, 10:00 am Wilder Center, St. Paul, MN
November 21, 2017	.....	Tax Update, Chapter Meeting, 7:30 am, GVCC
December 19, 2017	.....	Chapter Meeting-Allied Professional Meeting & Social, 2:30 pm, GVCC
January 16, 2018	.....	Economic Forecast, Chapter Meeting, 7:30 am, GVCC

See Website for Details: <http://www.fpamn.org/financial-professionals/calendar2/>

October 16-17, 2017
Downtown Convention Center
Minneapolis, MN

★ Annual Symposium ★

The speaker line-up includes:

- Mary Beth Franklin**
- Bob Keebler**
- Jay Mooreland**
- ★ **Dan Candura**
- Craig Empey**
- Chad Halbur**
- Mark LeBlanc** ★
- Ron Rhoades**
- ★ **Joel Mullen**
- Brian Edstrom**
- Marty Fleischhacker**
- Mary Schmid** ★
- Beth Nemec**
- Don McNeil**
- ★ **Timothy Duncan**
- Amy Wolff**
- David Kelly** ★
- Krishna Memani**
- Chris Wills**
- Carolyn McClanahan**
- Theresa Rose**
- Joy Sorensen Navarre**
- ★ **RJ Devick** ★

View Details online:

www.FPAMNSymposium.org