FPA's 2010 Financial Planning Week®

FPA is excited to announce that its ninth annual Financial Planning Week® was a huge success. Financial Planning Week brings together those who provide, support and benefit from financial planning. During the week, FPA strives to create and build the public's awareness of the financial planning process to enable individuals to make smart financial decisions to achieve their life goals and dreams.

To celebrate, FPA and its nationwide network of chapters conducted events across the country, including Financial Planning Days, educational seminars, hotlines and interviews – more than 70 events and 18 proclamations were secured nationwide by 36 chapters to help individuals discover the value of financial planning.

Through our efforts, the following activities were achieved:

- This year's Financial Planning Week was featured in 170 media outlets including, print, Internet and broadcast, reaching nearly 30 million readers and viewers. Financial Planning Week was also featured in numerous consumer newspapers and magazines including the Associated Press, the *Atlanta Journal Constitution*, the *Chicago Tribune*, MarketWire, the *Orlando Sentinel*, Reuters, and Yahoo! Finance.
- FPA was featured in a special supplement of *The Wall Street Journal* for the sixth time on October 12. The supplement, "A Guide to Financial Planning," focused on the value of financial planning. Within the section is a special message from FPA President Tom Potts, Ph.D., CFP®, and a financial planning Q&A with several FPA members. *The Wall Street Journal* reaches nearly 2 million readers with its weekday edition.
- FPA teamed up with Junior Achievement (JA) for the fourth time to teach elementary, junior and high school student's basic money management skills. Hundreds of FPA members volunteered to deliver financial literacy programs to hundreds of students in schools nationwide.

In addition to the traditional Financial Planning Week activities, we were pleased to work with our chapters to launch a new ground-breaking program, Financial Planning Days in October 2010. Financial Planning Days was created in partnership with FPA, Certified Financial Planner Board of Standards, Foundation for Financial Planning and The U.S. Conference of Mayors. Financial Planning Days was a first-of-its kind effort to help Americans with their financial planning needs through a series of clinics and educational workshops powered by the financial planning community and embraced by city governments nationwide. As part of Financial Planning Days, qualified and experienced financial planners provided free, no-strings attached advice and education in 20 cities nationwide. Through Financial Planning Days, we aspired to help Americans discover the value of financial planning, improve the nation's economic stability, and develop and implement sustainable community programs that continue to grow and support our initiative over time by empowering thousands of individuals with financial planning information. You can learn more about Financial Planning Days at www.FinancialPlanningDays.org or by calling 800.322.4237, Ryanne Enyeart (ext. 7151) or Amira Tart (ext. 7346). You can also e-mail PublicAwareness@FPAnet.org. View 2010 Financial Planning Days video.

Please see the following pages for more details regarding FPA's 2010 Financial Planning Week activities and proclamations.

FPA's 2010 Financial Planning Week Activities

Alabama

October 7, 2010 (10:00 a.m. — 6:00 p.m.)
The Financial Planning Association of North Alabama hosted Financial Planning Day on October 7 at the Birmingham Downtown Library in Birmingham, Ala. Free 15 minute financial planning group presentations were scheduled as needed throughout the day. Free 20 minute or less one-on-one financial planning sessions were also be available.

Arizona

October 23, 2010 (10:00 a.m. — 3:00 p.m.)
Mesa Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at the Mesa Convention Center in Mesa, Ariz. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Mesa Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

California

October 2, 2010
Oakland Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 2 at Oakland City Hall in Oakland, Calif. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Oakland Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

October 2 (9:00 a.m.)
The Financial Planning Association on San Diego participated in a radio talk show interview, "Money Talk Radio," on AM 600 on October 2 at 9:00 a.m. Aubrey Morrow, CFP®, and FPA member Jon Beyrer, CFP®, were interviewed.

October 2 (10:00 a.m. — 1:00 p.m.)
The Financial Planning Association on San Diego participated in a radio talk show interview, "Your Money, Your Wealth," on AM 760 on October 2 at 10:00 a.m. Joe Anderson, CFP®, and FPA member Jon Beyrer, CFP®, were interviewed.

October 2 (12:00 — 1:00 p.m.)
The Financial Planning Association on San Diego participated in a radio talk show interview, "Your Money Matters," on AM 1170 on October 2 at 12:00 p.m. FPA members, Chris Rand, CFP®, and Cathie Restivo, CFP®, were interviewed.

October 3 (12:00 p.m.)
The Financial Planning Association on San Diego participated in a radio talk show interview, "Money in the Morning," on AM 600 on October 3 at 12:00 p.m. George Chamberlin, and FPA member Cathie Restivo, CFP®, were interviewed.

October 4, 2010 (2:00 — 4:00 p.m.)
The Financial Planning Association on San Diego hosted Pro Bono Financial Counseling Sessions on October 4 at the Encinitas Branch Library in Encinitas, Calif. Participants were able to meet with a Certifed Financial Planner™ for 20 minutes to ask questions regarding planning issues.

October 4, 2010 (6:15 — 7:45 p.m.)
The Financial Planning Association on San Diego hosted a seminar, "Financial Fire Drill: Planning for Uncertain Times," on October 4 at El Cajon Branch Library in El Cajon, Calif. The seminar featured a discussion of the steps you can take to help navigate these uncertain times.

October 5, 2010 (6:00 — 7:30 p.m.)
The Financial Planning Association on San Diego hosted a seminar, "Taking Control of Your Finances," on October 5 at the Encinitas Branch Library in Encinitas, Calif. The seminar included a discussion about financial planning “starter kits” that lay out eight steps to taking control of your finances. The steps are: Organize your records, calculate your net worth, draw up a saving and spending plan, build an emergency fund, create a debt management plan, address estate planning, acquire proper insurance, and finally, put it all together in a comprehensive financial plan.

October 6, 2010 (6:00 — 8:00 p.m.)
The Financial Planning Association on San Diego partnered with the *San Diego Union Tribune* to host the Ask a Planner Hotline on October 6. The hotline was open to the public and callers were able to speak one-on-one with financial planning experts from FPA about their financial questions and concerns.

October 6, 2010 (6:00 — 8:00 p.m.)
The Financial Planning Association on San Diego hosted a military event, "Accomplishing Your Financial Mission," on October 6 at the Point Loma/Harvey San Diego City Branch Library in San Diego, Calif. Geared toward young military service-members, this overview of financial management discussed the financial planning process, how to establish goals, how to control spending, manage debt, and how to put yourself in a good position to accomplish goals like buying a house, raising a family, retiring comfortably. Also included was a discussion of the benefits, features and issues specific to the U.S. Military, the issues around going into combat and planning for the “what-ifs.”

October 7, 2010 (4:00 — 5:00 p.m.)
The Financial Planning Association on San Diego hosted a seminar, "Taking Control of Your Finances," on October 7 at the South Chula Vista Branch Library in Chula Vista, Calif. The seminar included a discussion about financial planning “starter kits” that lay out eight steps to taking control of your finances. The steps are: Organize your records, calculate your net worth, draw up a saving and spending plan, build an emergency fund, create a debt management plan, address estate planning, acquire proper insurance, and finally, put it all together in a comprehensive financial plan.

October 7, 2010 (5:00 — 6:00 p.m.)
The Financial Planning Association on San Diego hosted a seminar, "A Consumer Guide for Investing," on October 7 at the South Chula Vista Branch Library in Chula Vista, Calif. The seminar included a discussion of the issues consumers face when investing and seeking professional financial advice. Topics included: key concepts of investing, how to be a smarter investor, the different types of financial advisors and the differences in financial advice related to each fraud protection, common scams and misleading advice, the FPA standard of care, and current financial regulatory issues and a call to action.

October 7, 2010 (6:00 — 8:00 p.m.)
The Financial Planning Association of San Joaquin Valley hosted "The Record Call-In" on October 7 at The Record in Stockton, Calif. Financial planners from the FPA of San Joaquin Valley chapter offered answers and advice during the free, two hour call-in hotline.

October 9, 2010 (10:30 a.m. — 5:00 p.m.)
Silicon Valley Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 9 at the Sunnyvale Public Library in Sunnyvale, Calif. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Silicon Valley Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

October 9, 2010 (12:00 — 1:30 p.m.)
The Financial Planning Association on San Diego hosted a seminar, "Taking Control of Your Finances," on October 9 at the 4S Ranch Branch Library in San Diego, Calif. The seminar included a discussion about financial planning “starter kits” that lay out eight steps to taking control of your finances. The steps are: Organize your records, calculate your net worth, draw up a saving and spending plan, build an emergency fund, create a debt management plan, address estate planning, acquire proper insurance, and finally, put it all together in a comprehensive financial plan.

October 9, 2010 (1:30 — 3:00 p.m.)
The Financial Planning Association on San Diego hosted a seminar, "A Consumer Guide for Investing," on October 9 at the 4S Ranch Branch Library in San Diego, Calif. The seminar included a discussion of the issues consumers face when investing and seeking professional financial advice. Topics included: key concepts of investing, how to be a smarter investor, the different types of financial advisors and the differences in financial advice related to each fraud protection, common scams and misleading advice, the FPA standard of care, and current financial regulatory issues and a call to action.

October 14, 2010 (3:30 — 4:30 p.m.)
The Financial Planning Association on San Diego hosted a seminar, "Taking Control of Your Finances," on October 14 at the Logan Heights Branch Library in San Diego, Calif. The seminar included a discussion about financial planning “starter kits” that lay out eight steps to taking control of your finances. The steps are: Organize your records, calculate your net worth, draw up a saving and spending plan, build an emergency fund, create a debt management plan, address

estate planning, acquire proper insurance, and finally, put it all together in a comprehensive financial plan.

October 14, 2010 (4:30 — 5:30 p.m.)
The Financial Planning Association on San Diego hosted a seminar, "A Consumer Guide for Investing," on October 14 at the Logan Heights Branch Library in San Diego, Calif. The seminar included a discussion of the issues consumers face when investing and seeking professional financial advice. Topics included: key concepts of investing, how to be a smarter investor, the different types of financial advisors and the differences in financial advice related to each fraud protection, common scams and misleading advice, the FPA standard of care, and current financial regulatory issues and a call to action.

October 16, 2010 (10:00 a.m. — 4:00 p.m.)
San Francisco Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 16 at UC-Hastings College of the Law in San Francisco, Calif. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

San Francisco Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

O**ctober 23, 2010 (10:00 a.m. — 4:00 p.m.)**
Los Angeles Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at the Central City Neighborhood Partners Facility in Los Angeles, Calif. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Los Angeles Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

October 23, 2010 (10:00 a.m. — 3:00 p.m.)
Orange County Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at the Huntington Beach Central Public Library in Huntington Beach, Calif. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Orange County Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

Colorado

October 9, 2010 (10:00 a.m. — 2:00 p.m.)

Denver Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 9 at the Colorado Convention Center in Denver, Co. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Denver Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

Florida

October 2, 2010 (10:00 a.m. — 3:00 p.m.)

Miami Financial Planning Day provided free, no strings attached financial advice from professional financial planners on Saturday, October 2, at the James L. Knight Center in Miami, Fla. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Miami Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

October 4, 2010

The Financial Planning Association of Southwest Florida teamed up with the nationally recognized organization Folds of Honor to offer four to five families a series of financial planning consultations. FPA members volunteer their time to help the families by meeting with them once a quarter. This allows time to prepare a financial plan for the family and help guide and monitor the progress over the course of a year. The program was launched during Financial Planning Week in October.

October 5, 2010 (11:00 a.m.)

The Financial Planning Association of Broward teamed up with Sun Sentinel to host "Sun Sentinel Your Money Helpline" on October 5 in Fort Lauderdale, Fla. Financial planners answered questions from the public via a telephone hotline and/or internet chat.

October 17, 2010 (10:00 a.m. — 4:00 p.m.)
The Financial Planning Association of Central Florida teamed up with Orlando Sentinel to host "Ask an Expert Hotline" on October 17 in Orlando, Fla. Financial planners answered questions from the public via a telephone hotline and/or internet chat.

Georgia

September 28, 2010 (11:15 a.m.)
The Financial Planning Association of Georgia hosted the gubernatorial proclamation signing on September 28 at the State Capitol in Atlanta, Ga. Georgia Governor Sonny Perdue helped the FPA of Georgia kick off Financial Planning Week by signing a proclamation declaring October 4-10 as Financial Planning Week in the State of Georgia.

October 5, 2010 (8:30 a.m. — 1:00 p.m.)
The Financial Planning Association of Georgia teamed up with Junior Achievement to host Junior Achievement Day at Coretta Scott King Young Women's Leadership Academy in Atlanta, Ga. Junior Achievement Day is an event designed to allow volunteers to reach students with an entire Junior Achievement program in one day during Financial Planning Week! Junior Achievement and Financial Planning Association of Georgia volunteers were provided with a curriculum and materials to lead four sessions over the course of several hours. By weaving their personal business experiences into the lessons, they brought a real world understanding to their class and inspired students to see the value of business and economics in their own lives.

Illinois

October 23, 2010 (10:30 a.m. — 2:30 p.m.)
Chicago Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at the Harold Washington Library in Chicago, Ill. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Chicago Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

Indiana

November 13, 2010 (10:00 a.m. — 3:00 p.m.)
Indianapolis Financial Planning Day provided free, no strings attached financial advice from professional financial planners on November 13 at the Schwitzer Student Center in Indianapolis, Ind. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Indianapolis Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide

united in an effort to provide free financial education and programming to communities throughout the U.S.

Kansas

October 4, 2010

The Financial Planning Association of Greater Kansas City featured a display on October 4 at the Topeka-Shawnee County Public Library in Topeka, Kan. The display included free educational handouts for the public focused on the value of financial planning and various other financial planning topics as well as a number of reputable financial books and publications which were available at the Topeka-Shawnee County Public library.

October 7, 2010 (11:30 a.m. — 1:30 p.m.)

The Financial Planning Association of Greater Kansas City hosted Open House: Free Financial Planning Information on October 7 at Clayton Financial Services in Topeka, Kan. This event was open to the public with refreshments and free information on financial planning.

Minnesota

October 16, 2010 (9:00 a.m. — 2:00 p.m.)

Twin Cities Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 16 at Burnsville Performing Arts Center in Burnsville, Minn. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Twin Cities Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

Mississippi

October 5, 2010 (10:00 a.m. — 3:00 p.m.)

The Financial Planning Association of Mississippi presented a seminar on October 5 at the State Treasurer's Office in Jackson, Miss. The workshop had a panel format with the following topics presented: Planning Your Estate, Focus on Your Finances and Understanding Investments.

October 5, 2010 (1:30 — 3:00 p.m.)

The Financial Planning Association of Mississippi presented a panel discussion on a variety of financial planning topics on October 5 at Mississippi College in Clinton, Miss. The following topics were presented: Nine Big Mistakes When Planning for Retirement, Planning Your Estate and Financial Planning.

October 6, 2010 (8:00 — 9:00 a.m.)

The Financial Planning Association of Mississippi presented a one hour panel discussion on Radio Station WJNT on Wednesday, October 6th. The following topics were discussed: Tax Planning Under the New Tax Law Changes, Planning Your Estate and Financial Planning. The following Financial Planning Association members participated on the program: Michael Denny, CFP®, CPA, David R. Lynch, CPA, J.D., LL.M, and Chris McAlpin, MBA, CMFC, CFEd.

October 7, 2010 (10:00 — 11:00 a.m.)
The Financial Planning Association of Mississippi presented a financial planning seminar on October 7 at the Secretary of State Office in Jackson, Miss. The following topics were discussed: Tax Planning Under the New Tax Law Changes and Financial Planning.

October 7, 2010 (1:30 – 3:00 p.m.)
The Financial Planning Association of Mississippi presented a financial planning seminar on October 7 at Belhaven College. The workshop had a three panel format with the following topics presented: 15 Financial Myths, Planning Your Estate, and The Role of the Government and the U.S. Economy Past, Present and Future.

Missouri

October 5, 2010 (6:30 p.m.)
The Financial Planning Association of Greater Kansas City hosted the seminar, "Financial Firedrill," on October 5 at the Cleaver Family YMCA in Kansas City, Mo. The seminar helped prepare individuals for uncertainty by getting their financial house in order.

Nebraska

October 23, 2010 (9:00 a.m. — 4:00 p.m.)
Omaha Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at Metro College. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Omaha Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S..

New Jersey

October 4, 2010
The President of Bergen Community College proclaimed October 4-8, 2010 as Financial Planning Week on campus.

October 4 — 25, 2010
The Financial Planning Association of New Jersey hosted the FPA E$$AY Challenge at Bergen Community College.

October 4, 2010 (9:30 a.m. — 12:30 p.m. & 1:45 — 7:00 p.m.)
The Financial Planning Association of New Jersey hosted Financial Health Day on October 4 at Beargen Community College in Paramus, N.J. The following topics were discussed: the financial planning process, money management, budgeting and credit.

October 6, 2010 (1:45 — 7:00 p.m.)
The Financial Planning Association of New Jersey hosted Financial Health Day on October 6 at Beargen Community College in Paramus, N.J. Three financial planning presentations took place followed by a question and answer session. Topics included: general financial planning, money management, budgeting and credit.

October 8, 2010 (1:00 — 2:30 p.m.)
The Financial Planning Association of New Jersey hosted the seminar, "Beware: Tips on ID Theft & Senior Designation Abuse," on October 8 at the North County Library in Clinton, N.J. ID Theft practices and how to avoid them and the new state law on Senior Designation Abuse were covered.

October 9, 2010 (7:00 — 8:30 p.m.)
The Financial Planning Association of New Jersey hosted the seminar, **"**A Financial Fire Drill," on October 9 at the North County Branch Library in Clinton, N.J. Just as a fire drill helps individuals practice escape routes in an emergency the Financial Fire Drill is designed to help attendees work through how they might cope should their income drop due to a job loss or other adverse event.

October 13, 2010 (8:30 a.m. — 1:30 p.m.)
The Financial Planning Association of New Jersey participated in the Financial Literacy Summit on October 13 at Rutgers in Piscataway, N.J. The goal of the summit was to raise awareness of the importance of financial literacy education and the resources available to support instruction in grades K-12. FPA of New Jersey exhibited and discussed the resources available for high school students.

October 16, 2010 (9:30 a.m. — 3:00 p.m.)
Elizabeth Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 16 at the Union County College Elizabeth in Elizabeth, N.J. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Elizabeth Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

October 26, 2010 (7:00 — 8:30 p.m.)
The Financial Planning Association of New Jersey hosted the seminar, "Real World Retirement Planning," on October 26 at the Hunterdon County Library in Flemington, N.J. This presentation offered information relevant to each stage in a working adult's professional life — from the twenty-something to the final years before retirement.

October 29, 2010 (1:00 — 2:30 p.m.)
The Financial Planning Association of New Jersey hosted the seminar, "Tips to Protect Your ID & Avoid Scams," on October 29 at the North County Branch Library in Clinton, N.J. So-called "senior specialists" were discussed with respect to new New Jersey legislation on Senior Designation Abuse.

New York

October 2, 2010 (8:00 a.m. — 5:00 p.m.)
The Financial Planning Association of New York teamed up with New York University and Kiplinger's Personal Finance magazine to host the Eighth Annual Fitness Workshop at the New York University School of Law in New York, N.Y.

Attendees got a wealth of information from Certified Financial Planners® and other experts, and were able to select from sixteen different sessions. Topics included: Credit Scores, Credit Repair and Identity Theft: What You Don't Know Can Hurt You; The Quest for income: Bonds, Stocks and Cash; Social Security: Get the Scoop; Long-term Care Insurance: A Necessary Evil?; Mutual Funds/ETFs: The Basics of Picking Funds; Lifestyle Choices: Stress-Free Budgeting and Debt Management; IRAs/Roth IRA'S: To Convert or Not?; Lessons from the Turmoil — Your Retirement Portfolio.

October 23, 2010 (10:00 a.m. — 4:00 p.m.)
New York City Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at the High School of Economics and Finance in New York, N.Y. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

New York City Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

North Carolina

October 6, 2010 (1:30 — 4:30 p.m.)
The Financial Planning Association of Charlotte teamed up with Goodwill Industries of the Southern Piedmont to provide free one-on-one financial planning to Goodwill employees on October 6 in Charlotte, N.C.

Ohio

October 5, 2010 (7:30 p.m.)
The Financial Planning Association of Northeast Ohio hosted a free public showing of I.O.U.S.A. the Movie (America's DEBT) on October 5 at the Cedar Lee Theatre in Cleveland Heights, OH. I.O.U.S.A. boldly examines the rapidly growing national debt and its consequences for the United States and its citizens. There was also a pre-movie "Happy Hour" Meet & Greet at Lopez from 5:30 - 7:00 p.m. Light hors d'oeuvres were available along with a cash bar.

October 13, 2010 (6:00 — 8:00 p.m.)
The Financial Planning Association of Northeast Ohio and Consumer Credit Counseling Service of Northeastern Ohio, in conjunction with the Akron Beacon Journal hosted a financial call-in for Akron Beacon Journal readers on October 13 at the Akron Beacon Journal in Akron, OH. Last year, through the same event, FPA provided financial guidance and support to more than 100 callers on issues ranging from retirement planning to bankruptcy.

October 14, 2010 (7:30 p.m.)
The Financial Planning Association of Northeast Ohio hosted a free public showing of I.O.U.S.A. the Movie (America's DEBT) on October 5 at the Capitol Theatre in Cleveland, OH. I.O.U.S.A. boldly examines the rapidly growing national debt and its consequences for the United States and its citizens. There was also a pre-movie "Happy Hour" Meet & Greet at Luxe from 5:30 - 7:00 p.m. Light hors d'oeuvres were available along with a cash bar.

October 16, 2010 (10:00 a.m. — 1:00 p.m.)
The Financial Planning Association of Northeast Ohio and Consumer Credit Counseling Service of Northeastern Ohio, in conjunction with the Akron Beacon Journal hosted a financial call-in for Akron Beacon Journal readers on October 16 at the Akron Beacon Journal in Akron, OH. Last year, through the same event, FPA provided financial guidance and support to more than 100 callers on issues ranging from retirement planning to bankruptcy.

October 23, 2010 (10:00 a.m. – 4:00 p.m.)
Cincinnati Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at the Cincinnati Downtown Public Library in Cincinnati, OH. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Cincinnati Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

Oregon

October 2, 2010 (10:30 a.m. — 12:30 p.m.)
The Financial Planning Association of Oregon and SW Washington hosted a free seminar "College Planning Workshop — Launch Into College Planning… Are You Ready?" on October 2 at the Beaverton Public Library in Beaverton, Ore. This seminar was designed for high school students and their parents and/or grandparents, and high school teachers and counselors to assist them in learning about effective academic planning and college funding strategies available in today's environment.

October 23, 2010 (10:00 a.m. — 4:00 p.m.)
Eugene Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at the Sheldon Community Center in Eugene, Ore. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

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Pennsylvania

October 4, 2010 (4:00 p.m.)
The Financial Planning Association of Pittsburgh hosted "So You Want to Be a Millionaire?" on October 4 at Robert Morris University in Pittsburgh, Penn.

October 5, 2010 (8:00 p.m.)
The Financial Planning Association of the Philadelphia Tri-State Area hosted a live telecast on Berks Community Television (BCTV) on October 5 at 8:00 p.m. BCTV is carried on the local cable stations throughout Berks County, including the City of Reading. Berks County has a population of about 400,000. Every October the program occurs during Financial Planning Week. The present format of the program is a 30-minute live telecast. The program was recorded and rebroadcasted three times during the month after the initial live program. It was also available streaming live on the BCTV website. The co-hosts were all CFPs and members of the FPA. They discussed the overwhelming need to educate people about financial responsibility and helped promote our Financial Planning Day scheduled for October 23, 2010.

October 23, 2010 (9:00 a.m. – 2:00 p.m.)
Philadelphia Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at Ben Franklin High School in Philadelphia, Pa. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Philadelphia Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

Tennessee

October 7, 2010 (4:00 – 6:00 p.m.)
The Financial Planning Association of the Mid-South hosted the Financial Call-a-Thon on October 7 at the WREG Channel 3 News station in Memphis, Tenn. Financial planners answered incoming phone calls from the public about general financial questions, including budgeting, mortgage, debt management, general investment, tax planning, etc.

FPA volunteers also taught students about budgeting and personal finance at Sheffield High School. Prizes were given to students who answer questions about budgeting and personal finance correctly.

Texas

October 23. 2010
Houston Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at Barbara Jordan — Mickey Leland School of Public Affairs, Texas Southern University in Houston, TX. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Houston Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

Washington

October 23, 2010

Seattle Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at North Seattle Community College in Seattle, Wash. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

Seattle Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

Washington, D.C.

October 23, 2010

D.C. Financial Planning Day provided free, no strings attached financial advice from professional financial planners on October 23 at the Columbia Heights Educational Campus in Washington, D.C. The event featured experts from the Financial Planning Association® and highly qualified CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops were also offered on key personal finance topics.

D.C. Financial Planning Day was part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and The U.S. Conference of Mayors. The collaboration was a first-of-its kind effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S.

Wisconsin

October 9, 2010 (10:00 a.m. — 12:00 p.m.)

The Financial Planning Association of Southern Wisconsin presented several free workshops at Bryant and Stratton College on Saturday, October 9 from 10:00 a.m. to 12:00 p.m. The three workshops offered participants information and guidance on the following topics:

- **Reviewing Your Credit Report:** Explained how to get your free annual credit reports, what to look for as you review them and how to correct any mistakes that you find.
- **Taming the High Cost of College:** Discussed researching and finding college funding as well as strategic planning for your own college savings plans.
- **Financial Strategies & Insurance Options During Transition:** This presentation covered how a job change doesn't have to derail your retirement, and offers options to maintain your healthcare coverage.

Each workshop was offered concurrently, allowed time for questions and answers, and took one hour. Afterward, registrants met one-on-one with a planner for a free consultation.

2010 Financial Planning Week Proclamations

The states of Florida, Georgia, New York, Washington and Wisconsin declared the week of October 4 in 2010 Financial Planning Week.

The following cities declared the week of October 4 in 2010 Financial Planning Week:

Kansas
Topeka

Minnesota
Burnsville
Cloquet
Crookston
East Grand Forks
Erskine
Minneapolis
Moorhead
Plymouth
New York
Albany

Texas
Lubbock

Wisconsin
Milwaukee