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### Pro Bono Boot Camp Webinar

Learn some basics on how to be an effective *pro bono* volunteer and get CE credit!

The “*Pro Bono Boot Camp*” volunteer training presentation is now available online. Chapter *Pro Bono* Directors and volunteers can earn one hour of Continuing Education credit by taking a webinar. Click [here](#) to access the webinar.

The Boot Camp covers FPA *Pro Bono* guidelines, tips on working with low income clients, ideas about budgeting and debt management, and more. First offered November 2009, planners and chapters leaders have praised the presentation.

Chapter *Pro Bono* Directors can also deliver the presentation live at chapter meetings. Attendees at the live presentations will also earn the one hour of Continuing Education credit.

For more information, contact the *Pro Bono* Services department at [fpaprobono@fpanet.org](mailto:fpaprobono@fpanet.org).

### Pro Bono Directors Quarterly Conference Call & Monthly Surveys

The *Pro Bono* Directors Quarterly Conference Call will take place Friday, August 13, at 2 pm EST. John R. Power, CFP®, *pro bono* volunteer from FPA of Massachusetts will be online to discuss his chapter’s work with the military. We invite all Chapter *Pro Bono* Directors to participate in this call. The call will be recorded and posted on the *pro bono* website.

To RSVP and receive dialing information for this call, please email [amira.tart@fpanet.org](mailto:amira.tart@fpanet.org).

In addition, please take a moment to complete past Chapter *Pro Bono* Directors’ Surveys.

- [January](#)
- [February](#)
- [March](#)
- [April](#)
- [May](#)
- [June](#)

## New Resource - BoulevardR

FPA recently partnered with [BoulevardR](#) to launch a free financial planning service that can help your pro bono clients answer the question "Am I financially on track?" The new service, "Free Financial Roadmap," and its online dashboard is available on the [FPA public Web site](#) and provides "What If" simulations and can break down all the client's financial goals into actionable steps, delivering real value to the individual. [View](#) a short video tour of the Free Financial Roadmap.

You can benefit by sharing this new service with FPA members who plan to provide pro bono financial planning counseling through your FPA chapter. FPA members can request clients bring along their Free Financial Roadmap to dramatically streamline the data collection process and help advisers serve twice as many people. The Financial Roadmap will also help introduce basic financial planning concepts to the individual. Additionally, chapters can promote the Financial Roadmap service to their local media contacts as one more way that FPA is helping Americans cope in this economic crisis. [View](#) a sample Financial Roadmap.

FPA members can also work with BoulevardR to help them attract new clients through BoulevardR's Advisor-Branded Marketing Platform (AMP). Similar to FPA's Financial Roadmap service, the AMP can help advisers attract new clients by automatically engaging consumers, qualifying leads and scheduling first consultations. AMP is the first Web-based marketing platform created for financial advisers. All new members who sign-up will receive a free, personalized marketing plan at a 10% discount.

BoulevardR will also provide free marketing Webinars for FPA chapters interested in hosting an event to introduce the program to its members. The first presentation, *Low Cost Marketing: Generating referrals, email marketing, and SEO*, was provided to the FPA of San Francisco chapter on March 18<sup>th</sup>. For more information on these presentations and how FPA members can receive a 10% discount, contact Matt Iverson at [Matt@BoulevardR.com](mailto:Matt@BoulevardR.com) or call 888.412.5837.

## Volunteers Needed for Money Makeovers

The FPA's public-facing website recently launched a new feature, the Money Makeover, in which we profile the financial goals and financial problems of Americans from all walks of life, and match them up with a financial planner who creates a financial plan for them. You can see an example of the Money Makeover at this website, <http://www.fpaforfinancialplanning.org/ToolsResources/FPAMoneyMakeover/>

As part of this effort, we want planners who are part of the *pro bono* effort to work with those Americans who have requested a Money Makeover. In essence, here's how it works: Americans request a Money Makeover. Robert Powell, Content Strategist will forward these requests to the *pro bono* planner in the state/region where the person requesting the Makeover resides. The *pro bono* planner will then contact the Makeover candidate and begin the process of creating a financial plan, complete with a written profile and a solution for the FPA's website. The *pro bono* planner will work with Powell on the deliverables and deadlines. We look forward to your involvement in this project. Email Powell at [robert.powell@fpanet.org](mailto:robert.powell@fpanet.org) with questions.

## Subscribing to the Pro Bono Email Update

You are subscribed to this mailing list because you are listed in our database as a chapter *Pro Bono* Director or similar position. Please feel free to circulate this email update to other FPA members you feel would benefit from its contents. Persons interested in being added to the distribution list should send an email to [fpaprobono@fpanet.org](mailto:fpaprobono@fpanet.org), clearly stating his/her desire to be added to our mailing list.

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