FPA's 2008 Financial Planning Week®

FPA celebrated its seventh annual Financial Planning Week October 6 – 12, 2008. FPA is excited to announce that its seventh 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 prudent financial decisions to achieve their life goals and dreams.

FPA and its nationwide network of chapters conducted events across the country, including educational seminars, hotlines and interviews –108 events and 52 proclamations (22 gubernatorial and 30 mayoral) were secured nationwide by 56 chapters to help individuals discover the value of financial planning.

Additionally, FPA was featured in an October 4 special supplement of *The Wall Street Journal.* The supplement, "A Guide to Financial Planning," focused on financial planning myths and common mistakes, retirement planning, answers to common financial planning questions, tips on working with a financial planner and features an interview with John E. Nelson, co-author of "What Color Is Your Parachute? For Retirement: Planning Now for the Life You Want."

Finally, FPA staff volunteered on Friday, October 17 at the Food Bank of the Rockies. Food Bank of the Rockies distributes food and essentials to people in need. This is FPA's fourth annual staff volunteer day with the Food Bank of the Rockies.

Please see the following pages for more details regarding FPA's 2008 Financial Planning Week activities and proclamations.

FPA's 2008 Financial Planning Week Activities

Alabama

October 6 – 12

The Financial Planning Association of North Alabama was consistently in touch with their local news stations to provide a telephone hotline during Financial Planning Week. The hotline was to provide general finance information to callers and to promote FPA. They expected a number of calls related to the "worries of Wall Street versus Main Street" and are prepared volunteers accordingly. Due to the financial crisis and political demands on the media, stations were unwilling to commit to specific times.

October 7

The Financial Planning Association of North Alabama partnered with a local library to host, "Financial Planning in Troubled Times." The program was open to the public and was promoted in the *Birmingham Business Journal,* chapter's e-mail subscribers and at the library.

Arizona

October 6 and 7

The Financial Planning Association of Greater Phoenix hosted "Financial Planning Days" at the Arizona State Capitol Rotunda at 1700 W. Washington in Phoenix, Ariz. The event was open to state employees only. Participants learned about the basics of saving and investing, mortgages, budgeting, retirement planning, long-term health care, caring for a loved one, choosing the right insurance and estate planning through various workshops and one-on-one consultations.

October 7

The Financial Planning Association of Greater Phoenix partnered with the *Arizona Republic* to host a free telephone hotline. The hotline was open to the public and callers were able to speak one-on-one with financial planning experts from FPA to discuss their financial questions and concerns.

October 7

The Financial Planning Association of Greater Phoenix and Junior Achievement partnered to teach elementary school-aged children valuable financial concepts important to their everyday lives. FPA volunteers shepherded students through JA's Biz Town, an interactive 10,000 square foot mock city. Students discovered real-life opportunities available in the free enterprise system. FPA members also served as volunteer classroom instructors in elementary and middle schools.

October 10 and 11

The Financial Planning Association of Greater Phoenix partnered with local libraries to host a series of seminars designed to help individuals learn about the benefits of financial planning. Sessions included the "Top Ten Issues for Retirement Planning Today," "Aging Parents and Those Who Love Them," and "Dealing with Credit and Foreclosure Issues." FPA members were available for one-on-one counseling at all events. Events were scheduled as follows:

- October 10, Peoria Public Library
- October 10, Chandler Public Library (Downtown)
- October 11, Scottsdale Civic Center Library

Arkansas

October 6 – 12

The Financial Planning Association of Arkansas sponsored free financial planning clinics in several locations throughout the state of Arkansas.

California

October 4

The Financial Planning Association of East Bay, San Francisco and Silicon Valley in collaboration with Assembly member, 16th District, Sandre R. Swanson, hosted a financial planning clinic to kick off Financial Planning Week. The free clinic was open to the public and was held at Oakland City Hall Building. Attendees were able to speak one-on-one with financial planning experts from FPA to discuss their financial questions and concerns. In addition, educational workshops on diverse and popular financial topics were presented by leading experts in personal finance.

October 6 – 12

The Financial Planning Association of Central California led a class on budgeting at the Downtown Fresno Library for community members in Fresno, Calif. Several FPA members will attend the class to answer questions and assist with the presentation. This is a low-income neighborhood where financial planning advice is rarely disseminated, but is in the most need of financial planning advice. The event was promoted in the local newspaper, *Fresno Bee*, along with FPA's *Financial Planning Perspectives* articles.

October 7

The Financial Planning Association of San Francisco hosted two, half-day long financial planning symposiums that addressed important financial planning topics including getting in front of money issues, retirement planning and investing basics. The event was held at the Golden Gate University in San Francisco, Calif. It was open and free to the public.

October 8

The Financial Planning Association of San Diego teamed up with the *San Diego Union-Tribune* to host a free telephone hotline. The hotline was open to the public and callers were able to speak one-on-one with financial planning experts from FPA to discuss their financial questions and concerns. The hotline was promoted in the October 8 issue of the *San Diego Union-Tribune*.

October 8

The Financial Planning Association of San Diego partnered with Junior Achievement to host JA Biz Town to help America's youth develop a strong understanding of the relationship between what they learn in school and their successful participation in a worldwide economy. FPA members worked with students from Kimball Elementary School in San Diego, Calif. to combine in-class learning with a day-long visit to a fully-interactive simulated town facility. The program helped students connect the dots between what they learn in school and the real world.

October 8

The Financial Planning Association of Orange County partnered with local libraries to host a series of workshops on budgeting to help individuals learn the benefits of financial planning. Events were scheduled as follows:

- October 8, Fountain Valley Public Library
- October 8, Dana Point Public Library

October 9

The Financial Planning Association of Los Angeles teamed up with the *Daily Breeze* to host a free telephone hotline. The hotline was open to the public and callers were able to speak one-on-one with financial planning experts from FPA to discuss their financial questions and concerns.

October 12
The Financial Planning Association of Silicon Valley partnered with the Cupertino Library to host “Real Life Retirement Planning.” The financial planning seminar discussed retirement planning and questions you should ask a financial planner when interviewing them and what resources to use to find a CFP® professional. The event was promoted in the monthly newsletter, *Cupertino Scene*. The newsletter was sent to Cupertino residents and the event was also promoted at the library.

Colorado

October 7 and 9
The Financial Planning Association of Southern Colorado hosted a series of financial planning workshops at libraries for individuals to learn the benefits of financial planning and how to choose the right financial planner. Events were scheduled as follows:

- October 7, Penrose Public Library
- October 9, Cheyenne Mountain Public Library

October 8, 2008
The Financial Planning Association of Colorado hosted a semiannual “New Member Lunch.” All members who recently joined the chapter, allied professionals and the public were invited. “The Benefits of CFP® Credentials” was the feature session at the event. Presenters included Paul Camp, PhD, CFP®, Chair of Department of Finance Metro State College and Scott Julsen, Corporate Education Specialist, College for College for Financial Planning™.

October 13
The Financial Planning Association of Colorado partnered with Channel 9 News to host its monthly telephone hotline, “MoneyLine.” FPA members were available to answer consumer questions on topics regarding financial planning.

Florida

September 24 and October 1
The Financial Planning Association of Northeast Florida, Family Foundations, Jacksonville University and the Mayor's Commission on the Status of Women hosted "From Purses to Portfolios" to provide financial literacy education for local women. The first stage of the initiative was aimed at mid-level managers of large local corporations including CSX, Blue Cross Blue Shield, Wachovia, Vistakon and others. The corporations fully funded the program.

October 5
The Financial Planning Association of Southwest Florida collaborated with *The News-Press* to host a free telephone hotline. The hotline was open to the public and callers were able to speak one-on-one with financial planning experts from FPA to discuss their financial questions and concerns. The hotline number was published in the Sunday, October 5 edition of *The News-Press*.

October 6 – 12
The Financial Planning Association of Tampa Bay spent a day at the Capitol in Tallahassee to celebrate Financial Planning Week. Financial Planning Week was officially proclaimed by the Florida legislature.

October 9 and 22
The Financial Planning Association of Gold Coast hosted a series of financial planning seminars to help "at-risk" children learn the importance of budgeting, saving and making wise money decisions at the following centers. Events were scheduled as follows:

- October 9, The Haven
- October 22, Turtles Nest

October 10
The Financial Planning Association of Miami-Dade teamed up with Communities in Schools of Miami to host financial literacy events, "Teens and Money." The events helped kids ages 11 – 14 discover the financial planning process and provided basic money definitions including goal setting, budgeting, saving and the time value of money. Events were scheduled as follows:

- October 10, Miami Rescue Mission
- October 10, NFL/YET Center

October 12
The Financial Planning Association of Central Florida and the *Orlando Sentinel* partnered to host a free telephone hotline. FPA members offered answers to help individuals with their financial planning questions. Select questions and answers were featured in the *Orlando Sentinel's* Business Section the following week.

Georgia

October 6
The Financial Planning Association of Georgia teamed up with the Atlanta Regional Commission, Area on Aging and AARP Georgia for a presentation from the Concord Coalition to discuss fiscal and budgetary issues that affected retirement plans for baby boomers and future generations. The event was held at Terry College of Business in Atlanta, Ga. FPA of Georgia chapter president discussed the recent FPA resolution supporting a Standard of Care. The chapter goal is to spread this message throughout the community of professionals and to the public via media. FPA members, media, students and allied professionals from other associations including CPAs, attorneys and others were invited.

Hawaii

October 9
The Financial Planning Association of Hawaii partnered with leading morning television show host Kirk Matthews to present information on financial planning and long-term health care insurance.

Idaho

October 6 – 12
The Financial Planning Association of Idaho teamed up with the *Idaho Business Review* to present its state's Financial Planning Week gubernatorial proclamation to the public.

October 6 – 12
The Financial Planning Association of Idaho partnered with Junior Achievement to help students discover the value of financial planning during Financial Planning Week at Initiative Learning Center, an elementary school in Nampa, Idaho. The partnership will continue through the spring session at various local elementary and middle schools throughout the state. Additionally, Junior Achievement published an article announcing its partnership with FPA of Idaho in the *Idaho Business Review* to increase awareness and importance of early financial literacy.

October 6 – 12
The Financial Planning Association of Idaho answered financial questions, provided advice and offered feedback on the economy during two radio programs. The radio programs also aired FPA's public service announcements during their broadcasts.

Louisiana

October 6 – 12
In an effort to include the Finance Students of Louisiana State University (LSU), a local Baton Rouge university, FPA of Baton Rouge board members presented to LSU's Finance Group on Financial Planning and Financial Services to promote the financial planning profession as a career. The chapter is also continuing to become more involved with the LSU Economics and Finance Departments, utilizing Dr. Loren Scott, Mark Fry and Dean Sumichrast - three professors with strong ties to LSU as well as the Baton Rouge business community. The chapter's continuing goal is to have LSU offer an undergraduate curriculum in Financial Services, since they believe business education is critical for economic development and the students are our future.

October 11
The Financial Planning Association of Ark-La-Tex teamed up with *The Times* to host a free telephone hotline. The hotline was open to the public and callers were able to speak one-on-one with financial planning experts from FPA to discuss their financial questions and concerns. Additionally, an online financial chat with FPA members was available.

Maryland

October 8
The Financial Planning Association of Maryland and Junior Achievement partnered to teach more than 100 underprivileged elementary school-aged children valuable financial concepts important to their everyday lives. FPA volunteers shepherded students through JA's Biz Town, an interactive 10,000 square foot mock city. Students discovered real-life opportunities available in the free enterprise system. FPA of Maryland was able to provide $3,000 needed to fund the event, thanks to a grant provided by the Foundation for Financial Planning.

Massachusetts

September 27
The Financial Planning Association of Massachusetts participated in the State Treasurer's Money Conference. The chapter provided over 20 money mentors, an informational table and a keynote speaker for the address. More than 1,800 people were expected to attend.

October 4
The Financial Planning Association of Massachusetts and the YWCA Malden teamed up to host, "DREAMS 101: Making it Happen in the Real World."

October 6
The Financial Planning Association of Massachusetts teamed up with Massachusetts State Treasurer Tim Cahill's Money Conference Team to host a free telephone hotline through the Money Mentor Call-Line.

October 6
The Financial Planning Association of Massachusetts partnered with the Boston Public Library, Investor Protection Trust and the Investor Protection Institute to host a series of seminars for individuals thinking about retirement or recently retired. “How Can I Afford Retirement?” investor education series will be held at the Boston Public Library throughout the remaining of the year. The events are free and open to the public.

Michigan

October 6 – 12
The Financial Planning Association of Michigan has submitted public service announcements to local radio and television stations and have published chapter events in local newspapers. The chapter has offered FPA’s *Financial Planning Perspectives* articles to local media as a resource for features.

Minnesota

October 15
The Financial Planning Association of Minnesota hosted a panel discussion, "Healthcare Reform: Building Momentum for Change," at the University of Minnesota Hubert H. Humphrey Institute of Public Affairs, Cowles Auditorium, 301 19th Avenue South, Minneapolis, Minn. The panel featured David Durenberger, Chair of the National Institute of Health Policy (NIHP), Senior Health Policy Fellow at the University of St. Thomas and former U.S. Senator from Minnesota (1978-1995); Dave Olson, President of the Minnesota Chamber of Commerce; Nancy Feldman, President and CEO of UCare; and Tim Penny, Senior Fellow – Center for the Study of Politics and Governance at the Humphrey Institute, Member of the Mayo Clinic Health Care Policy Symposium Advisory Panel and U.S. Congressman, House of Representatives (1983-1995). The event was moderated by Terry Gruca, award-winning anchor from WCCO-TV.

Mississippi

October 6 – 12
The Financial Planning Association of Mississippi teamed up with Channel 3, NBC affiliate to promote Financial Planning Week via a guest spot for an FPA member on television daytime show, Mississippi Happenings.

October 6
The Financial Planning Association of Mississippi teamed up with the *Mississippi Business Journal* to offer financial planning advice via a supplement.

October 7
The Financial Planning Association of Mississippi hosted, "In Search of the Midas Touch: Finding Your Path to Financial Independence," featuring author Robert Slee at the Country Club of Jackson in Jackson, Miss.

Missouri

September 26
The Financial Planning Association of Greater Kansas City ran an eight-page advertising supplement in the *Kansas City Business Journal* featuring six articles by chapter members and advertisements from members and sponsors. Articles focused on the voice of financial planning, business debt, bank failures, retirement and estate planning.

October 7
The Financial Planning Association of Greater Kansas City partnered with local NBC affiliate, KSHB, to host a free telephone hotline during the evening news. . The hotline was open to the public and callers will be able to speak one-on-one with financial planning experts from FPA to discuss their financial questions and concerns.

Nebraska

October 6 – 12

The Financial Planning Association of Nebraska delivered educational presentations in colleges and high schools throughout the state during Financial Planning Week. Last year, 12 FPA of Nebraska members made visits to high schools, colleges and senior citizen centers to deliver financial planning presentations. The chapter goal was to at least double the number of participants and presentations this year.

New Jersey

October 4

The Financial Planning Association of New Jersey presented at the Dover Health Fair in Dover, NJ to help the public learn about the basics of financial planning, budgeting and credit. FPA volunteers were also available to provide information and answer questions related to financial planning.

October 6 - 12

The Financial Planning Association of New Jersey partnered with the Department of Banking and Insurance (DOBI) to deliver financial literacy courses to students in highschools throughout the state.

October 6

The Financial Planning Association of New Jersey hosted a capitol day event at the New Jersey State Capitol at Goldfinch Square in Trenton, NJ. The event was open to legislators, staff members and the public. Attendees learned about the value of financial planning and had an opportunity to discuss financial planning issues through various financial planning workshops and one-on-one consultations.

October 7

The Financial Planning Association of New Jersey participated at Financial Health Day hosted by Bergen Community College. FPA volunteers presented a series of workshops to help students learn the basics of planning, money management and credit. The President of Bergen Community College also presented the New Jersey gubernatorial Financial Planning Week proclamation. An gift of $500 was also awarded to the winner for the FPA E$$AY Challenge.

October 7

The Financial Planning Association of New Jersey partnered with the New Jersey Society of Certified Public Accounts (NJSCPA) to host, "Surviving the Mortgage Crisis," at the NJSCPA office in Roseland, NJ.

October 8

The Financial Planning Association of New Jersey partnered with Junior Achievement to deliver courses at Village Charter School in Trenton, NJ. FPA volunteers helped students understand the basics of business and economics during the all-day educational event.

October 11

The Financial Planning Association of New Jersey hosted a special needs conference at the Children's Specialized Hospital in Mountainside, NJ.

October 18

The Financial Planning Association of New Jersey partnered with Mercer County in Hamilton, NJ to help tutors learn the benefits of financial planning. FPA presented the basics of financial planning, budgeting, credit and identity theft.

New Mexico

October 6 – 12

The Financial Planning Association of New Mexico partnered with radio station KKOB 770 KB to host a free telephone hotline. The hotline was open to the public and callers were able to speak one-on-one with financial planning experts from FPA to discuss their financial planning questions and concerns.

New York

October 2, 6 and 7

The Financial Planning Association of New York partnered with the New York Public Library to host a series of seminars designed to help individuals learn about the benefits of financial planning. Sessions included “Who Needs a Financial Planner? What Makes a Good Financial Plan?,” “Financial Goals and Investing – Smart Ways to Make Them Both Work,” and “Mutual Fund-a-mentals.”

October 4

The Financial Planning Association of New York, New York University and Kiplinger's Personal Finance magazine sponsored its sixth Annual Fitness Workshop at the New York University School of Law in New York, N.Y. The all-day public educational event included a morning panel of Kiplinger's editors, lunch keynote speaker Don Phillips from Morningstar Inc. and hosted a variety of personal finance sessions addressing long-term care insurance, investments, how to select a financial planner, sudden wealth, retirement planning, estate planning, budgeting and debt management, credit scores, identity theft and real estate . Admission for the event was $30 with net proceeds going to Project Renewal, a local program that helps the homeless get back on their feet and into jobs, homes and a better life.

October 5

The Financial Planning Association of Northeastern New York ran three different public service announcements during FPA member Steven Bouchey’s “Lets Talk Money” radio show on WGY. In addition, Bouchey’s Sunday, October 5 radio show featured FPA-NENY board members in a round table format to discuss FPA and the financial planning profession. Extra appearances to promote Financial Planning Week were also set up on Capital News 9.

October 6 – 12

The Financial Planning Association of Greater Hudson Valley teamed up with Girls Inc. of Westchester County and the Financial Women’s Association of New York to sponsor its inaugural conference in Westchester to help Westchester girls and women plan for a financially secure future.

October 11

The Financial Planning Association of Greater Hudson Valley partnered with the Ossining Public Library to host an "Ask-a-Planner" public event at Ossining Public Library in Ossining, NY. The event helped individuals discover the value of financial planning and understand the financial planning process. FPA of members were also available for one-on-one counseling sessions.

North Carolina

October 7, 8 and 9

The Financial Planning Association of Charlotte teamed up with Alliance Credit Counseling and Charlotte Saves to host a free telephone hotline, “Call-a-Planner.” The hotline was open to the public and callers were able to speak one-on-one with financial planning experts from FPA to discuss their financial questions and concerns.

October 8
The Financial Planning Association of Charlotte teamed up with Social Serves in Charlotte, N.C. to host a financial planning clinic. The clinic was open to Social Serves employees and attendees were able to speak one-on-one with financial planning experts from FPA to discuss their financial questions and concerns.

October 9
The Financial Planning Association of Charlotte was invited by Charlotte Foster Care to host a financial planning workshop. The workshop provided tips and advice on budgeting to foster care youth.

October 11
The Financial Planning Association of Charlotte has been invited by the Delta Sigma Theta Sorority, Charlotte Alumni chapter, to host a financial planning workshop for its members that will focus on financial planning considerations for new, small business owners. The event will be held at First Ward Elementary School in Charlotte, N.C.

October 11, 2008 (12 – 2 p.m.)
The Financial Planning Association of Charlotte was invited by the Delta Sigma Theta Sorority, Charlotte Alumni chapter, to host a financial planning workshop for its members that focused on financial planning considerations for new, small business owners. The event was held at First Ward Elementary School in Charlotte, N.C.

Ohio

September 25, October 22 and 25
The Financial Planning Association of Northeast Ohio teamed up with *The Akron Beacon Journal* to host a free telephone hotline. The hotline was open to the public and callers were able to speak one-on-one with financial planning experts from FPA to discuss their financial planning questions and concerns. The hotline was promoted in *The Akron Beacon Journal*.

October 5
The Financial Planning Association of Central Ohio teamed up with *The Columbus Dispatch* to offer financial planning advice via a full-color, eight-page supplement. The insert was distributed to over 340,000 people in the Central Ohio area. Eighty members of the chapter participated by paying to have their headshots and contact information included in the center spread of the insert. Three members participated by purchasing advertisements of various sizes, fifteen articles were submitted by members with a committee selecting eight to be included in the supplement, a letter from the chapter president and an article “Why a CFP®” was included.

October 6 – 11
The Financial Planning Association of Greater Cincinnati partnered with local libraries to host a series of financial planning workshops designed to help individuals chart the map toward their financial success. Attendees learned the financial planning process and what financial steps you need to take to reach your life goals. FPA members were also available after the workshops to answer specific finance-related questions and offer free advice. Events were scheduled as follows:

- October 6, Northside Branch Library
- October 7, Harrison Branch Library
- October 11, Mariemont Branch Library

October 18
The Financial Planning Association of Northeast Ohio teamed up with *The Akron Beacon Journal* to host a financial fair at John S. Knight Center in Akron, Ohio. The event was open to the public and will feature sessions on financial planning, health, education, government outreach and tips to stretch food, energy, transportation and entertainment dollars.

Oregon

October 11
The Financial Planning Association of Oregon and Southwest Washington partnered with the Beaverton Library in Beaverton, Ore. to host a two-hour financial planning workshop to help families plan their retirement. The workshop focused on government programs including Social Security and Medicare. The free event was open to the public and was held Beaverton Library.

Pennsylvania

October, 2008
The Financial Planning Association of Philadelphia Tri-State launched a new audio podcast about the services it offers to the public. The podcast outlines the roles and responsibilities of financial planners and giving advice on how consumers should choose the best financial planner for their personal needs. The program is available for downloading and listening on computers or digital audio players at no charge via FPA of Philadelphia Tri-State's Web site at www.fpaphilly.org. Listeners can also subscribe to receive future episodes in the series automatically at no cost.

October 4, 2008
The Financial Planning Association of Philadelphia Tri-State hosted "Ask the Senior Expert" at the Franklin Mills Mall in Philadelphia. The event was available at no charge to mall patrons. Senior health and wellness providers were also available to provide advice.

October 6 – 12
The Financial Planning Association of Central Pennsylvania partnered with Junior Achievement to raise awareness of financial planning during the week of Financial Planning Week.

October 6 – 12
The Financial Planning Association of Central Pennsylvania partnered with a local radio station to announce Financial Planning Week daily during Financial Planning Week.

October 6 – 12, 2008
The Financial Planning Association of Philadelphia Tri-State teamed up with Brandywine YMCA in Wilmington, Dele. to help educate YMCA members on the value of financial planning. Brandywine YMCA provided financial planning literature and an FPA member assisted with financial planning questions and concerns of the community during three days throughout the week of Financial Planning Week.

October 6, 8 and 10
The Financial Planning Association of Philadelphia Tri-State promoted the importance and value of financial planning on the PECO Building's marquee.

October 7
The Financial Planning Association of Central Pennsylvania partnered with Junior Achievement to promote financial literacy at Mechanicsburg Elementary School.

October 7 - 12
The Financial Planning Association of Philadelphia Tri-State teamed up with several media outlets to help individuals discover the value of financial planning and make smart financial decisions to achieve life goals and dreams.

October 6 – 12
The Financial Planning Association of Philadelphia Tri-State partnered with Delmarva Broadcasting Company (11 radio stations serving Delaware, Maryland and New Jersey) to run FPA public service announcements throughout Financial Planning Week.

October 8
The Financial Planning Association of Central Pennsylvania partnered with WGAL8 to host an Identity Theft forum at Sheraton Harrisburg/Hershey in Harrisburg, Pa. Brian Roche, co-anchor of “News8 at 5:30” weekday and a consumer/investigative reporter for News 8 presented at the forum. The forum covered identity theft, why identity theft is growing, how thieves steal your identity and how to prevent identity theft.

Rhode Island

October 9
The Financial Planning Association of Rhode Island hosted “Life Options – Financial Planning” at the So. Kingston Senior Center in Wakefield, R.I. The event was open to the senior center residents. Attendees had an opportunity to meet with a planner and pick-up brochures on several financial planning topics.

October 23
The Financial Planning Association of Rhode Island participated at the Northern Rhode Island Business Expo at Twin Rivers in Lincoln, R.I.

South Carolina

October 6 – 12
The Financial Planning Association of South Carolina participated in “Day on the Hill” during Financial Planning Week. FPA members went to the State House to engage lawmakers on their thoughts and ideas as it relates to financial planning. The chapter also planned to gain press coverage for their financial literacy book drive by giving members of the state legislature books to place in their respective public libraries.

October 9
The Financial Planning Association of South Carolina hosted a financial literacy book drive to put financial planning books in every county library throughout the state of South Carolina. A press conference was held at the state capitol in Columbia, S.C. featuring FPA members, the Department of Education and government officials to announce FPA of South Carolina's campaign.

Tennessee

October 4
The Financial Planning Association of Mid-South partnered with the Commercial Appeal to offer financial planning advice via an eight-page supplement. The insert featured articles and ads from local FPA members.

October 11
The Financial Planning Association of Mid-South partnered with the Christian Brother University, Commercial Appeal, Channel 3 and AM600 Radio to host a “Memphis Money” seminar at Christian Brother University. The event started with an opening session on how to choose a financial planner. Breakout sessions followed on various financial planning subjects.

October 11
The Financial Planning Association of Middle Tennessee teamed up with Belmont University to host a free Money Makeover Expo to help individuals achieve financial security. Multiple educational sessions on a variety of financial planning topics were offered, as well as 25 minute one-on-one sessions with a financial planner from FPA.

October 12
The Financial Planning Association of Middle Tennessee teamed up with *The Tennessean* to host a free telephone hotline. The hotline was open to the public and callers were able to speak one-on-one with financial planning experts from FPA to discuss their financial questions and concerns.

Texas

October
The Financial Planning Association of San Antonio and South Texas partnered with the U.S. Department of Labor, Women's Bureau to host an e-mail hotline that answered personal finance questions from Generation X and Y women throughout the month. The free hotline was available at www.wiseupwomen.org. In addition, an eight-part educational course through the U.S. Department of Labor, Women's Bureau Wi$eUp program was also available to help empower women to take charge of their financial lives.

October 4
The Financial Planning Association of Houston participated in the People's Law School conference at the University of Houston in Houston, Tex. Financial planning experts from FPA were at the conference to help individuals learn about the value of financial planning and answer financial planning questions.

October 4
The Financial Planning Association of Houston partnered with Rice University to host Financial Fitness Workshop with Rice University. The all-day educational event was open to the public and was held at Rice University in Houston, Tex.

October 6
The Financial Planning Association of Dallas/Ft. Worth teamed up with *The Dallas Morning News* to host a free telephone hotline. The hotline was open to the public and callers were able to speak one-on-one with financial planning experts from FPA to discuss their financial planning questions and concerns.

Vermont

October 10
The Financial Planning Association of Northern New England partnered with Manchester City Library and Montpelier Public Library to host "Ask a Planner" workshops. Attendees learned answers to their personal finance questions from FPA's financial planning experts.

Virginia

October 4 and 11

The Financial Planning Association of Hampton Roads partnered with local radio stations, WNIS (790 AM) during the Dan Bunting “Dollars and Common Sense” show on Saturday morning to feature FPA public service announcements that promoted financial planning and Financial Planning Week. FPA member, Dan Bunting, also used talking points provided by FPA and answered questions from callers.

October 8

The Financial Planning Association of Central Virginia partnered with Junior Achievement to deliver courses at Lakeside Elementary School in Richmond, Va. FPA volunteers helped more than 500 students understand the basics of business and economics during the all-day educational event.

October 10

The Financial Planning Association of Central Virginia teamed up with the Office of Multicultural Student Affairs and the School of Business Department of Finance, Insurance and Real Estate to host, “Credit Cards & Other Devilish Devices,” to help students learn the difference between the use and abuse of credit cards.

Washington

October 6 – 10

The Financial Planning Association of Puget Sound partnered with Junior Achievement to bring the significance of financial planning to area high school students this fall. FPA members presented the "NEFE High School Financial Planning Program" developed by the National Endowment for Financial Education and Junior Achievement. Students learned the basics of financial planning including how to create a financial plan, budgeting, investing, debt management, how to use credit wisely, saving, insurance and career goals.

October 6 – 12

The Financial Planning Association of Puget Sound hosted, “Celebrating the Stars,” during Financial Planning Week at a reception to honor champions of financial planning.

Washington D.C.

October 6 – 12

The Financial Planning Association of National Capital Area hosted a series of financial planning workshops at local schools and libraries to promote prudent financial planning decision-making and public awareness of the financial planning process.

Wisconsin

October 6

The Financial Planning Association of Southern Wisconsin hosted, “Discover Your Financial DNA®” at Bryant and Stratton College in Wauwatosa, Wisc. The event was presented by Sharon Green, WISN radio investment hostess and FPA member Liz Pollock, CFP®.

October 7 and 8

The Financial Planning Association of Northeast Wisconsin teamed up with “Moneytalks” to promote the chapter’s Financial Planning Week events.

2008 Financial Planning Week Proclamations

The states of Alabama, Arkansas, California, Florida, Georgia, Michigan, Minnesota, Mississippi, Nebraska, Nevada, New Hampshire, New Mexico, New York, Ohio, Oklahoma, Oregon, Pennsylvania, South Carolina, Tennessee, Texas, Washington and Wisconsin declared the week of October 6 in 2008 Financial Planning Week.

The following cities declared the week of October 6 in 2008 Financial Planning Week:

California
Fresno
San Diego

Kentucky
Mt. Sterling

Minnesota
Cloquet
Columbia Heights
Crookston
East Grand Forks
Moorhead
Plymouth
St. Paul

Nebraska
Omaha

Nevada
Las Vegas

New York
Albany

Oklahoma
Tulsa

Oregon
Portland

Pennsylvania
Philadelphia

Tennessee
Memphis
Shelby County

Texas
Addison
Allen
Austin
Dallas

Denton
Ft. Worth
Houston
McKinney
Plano
South Lake
Wichita Falls

Wisconsin
Clintonville