FPA
FINANCIAL PLANNING ASSOCIATION OF LONG ISLAND
The Heart of Financial Planning™

THE PLANNER

June 2009

1895 Lincoln Avenue
East Meadow, NY 11554
(516) 542-2004 , Fax (516) 542-2005
Email: fpali@optonline.net
www.fpali.org

PRESIDENT'S MESSAGE

It is hard to believe that my two year term as your president is up. As I look back over where we have been as a chapter and a profession over these last two years I do not think that we could have been put through a more challenging time then what we have experienced yet I am hopeful for both our chapter's future and the future of you our members. When faced with challenging times those who step up and address those challenges emerge even stronger when times recover.

It has always been our goal as your board to provide a forum to help you, our members become better planers and help you step up to assist your clients through all markets. To do so we need strong committees and hard work from our board. Over these two years we had additional challenges as one of our most effective leaders stepped down from what I believe is our most important and challenging position, Chairman of the Symposium committee. When Lou Cino stepped down in March of 2008 he left very big shoes to fill. As your president I can say right now that we all have been very lucky that those shoes were filled by Joe Fleischman. Joe and his committee took over the daunting task of running our annual symposium and kept it an event we all could be proud of. In order for Joe to step up Tony Papa also stepped up to take over the chairmanship of the education committee He has also done a great job.

I also need to thank all of the board members for their great work over the last two years and welcome our newest committee leader Michelle Buonincontri. Michelle, a new member of our Chapter this year has agreed to take over the production of our newsletter starting with our August issue. We always welcome new talent into our organization.

When it comes to thanking people it is important that I acknowledge the backbone of this chapter Janet Cino our administrator. Janet is the glue that keeps us together, Janet makes my job easy. On my behalf and behalf of all of our members I again wish to thank her for her great work.

Now it is time to pass my gavel on to our new president Moss Kaufman I know that he will be an excellent leader for us for the next two years.

However before I pass on the ceremonial gravel I have some final parting thoughts. The last decade has been a tough one for all of our businesses. We lived through the dot com bubble and the scandals surrounding it. Sept 11th will have its 8th anniversary this year. The financial collapse of last year I hope is a once in a lifetime event, however the fallout has yet to be fully felt. The writing on the wall tells us that the failure of the Government regulators to rein in risk and spot scandals such as those caused by Madoff and Stanford before they were so pervasive means that we will be subject to more scrutiny than ever before. Yet here we are, here we stand dedicated to guide our clients to the best course to reach their goals. Now more than ever the public needs an independent professional to guide them and we stand here to hold your hands as we step forth into the future. Have a great summer and I will see you in the fall.

Michael Kresh, CFP®
President

***Enjoy the Summer*!**

Board of Directors

2008-2009

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What's Happening —
Announcements from the Editor

> Nominate a colleague or yourself for the prestigious **Howard Black Award**! Nominations must be submitted by **August 31, 2009**. For more information and / or a nomination form, see page 9 or contact the chapter office at 516-542-2004.

> Our next program meeting will be held on **Wednesday, September 16th** from 5:30 to 8:30 PM at the Crest Hollow Country Club. The topic for this meeting will be on compliance for financail advisors and will be presented by Howard Eilen, of Lehman & Eilen LLP.

> ***SAVE THE DATE!*** The required CFP® Ethics Course will be given on Wednesday, **October 7th, 2009**, from 5:30 PM to 8:30 PM at the Crest Hollow Country Club, Woodbury, NY.

> ***SAVE THE DATE!*** Our next Annual Symposium and Exhibition will be held on **Friday, October 30, 2009** at the Crest Hollow Country Club, Woodbury, NY. See page 5 for an agenda and registration form!

> Please check the back cover for the schedule of monthly meetings, seminars and chapter events, or go to our web site www.fpali.org.

> Did you know that for every member you recruit you can earn a $25 coupon from National? Just make sure that the new member writes your name on their application as the person who referred him/her to the FPA. These coupons can be used toward the cost of your membership dues.

Many Thanks to Our 2008-2009
PLATINUM PARTNERS

AIG SunAmerica / Polaris
Kevin Cullen & Ralph Finelli

Coventry - Dan Cohen
877-836-8300; dcohen@coventry.com

Dreyfus Investments - Robert Kaler
917-837-6856; kaler.rj@dreyfus.com

DWS Investments - Anthony Camilleri
800-537-1004x48433; anthony.camilleri@db.com

ING Annuities - Ray Malone
718-825-4157; ray.malone@us.ing.com

Invesco Aim - Robert Larsen
1-800-337-4246x7832; robert.larsen@invescoaim.com

Jackson National - Stephen Burke
1-800-711-5653x8591; stephen.burke@jnli.com

John Hancock - Dave Pappas
516-481-5944; dpappas@jhancock.com

MainStay Funds - Dan Chodosch
917-270-7224; daniel_chodosch@nylim.com

Nationwide - Susan O'Connor
516-432-1007; oconnos3@nationwide.com

Oppenheimer Funds - Wendy Ehrlich
516-937-1422; wehrlich@oppenheimerfunds.com

Prudential Annuities - Carrie Short
800-628-6039x56998; carrie.short@prudential.com

GOLD PARTNERS

Accelerated Information Systems - Zaheer K. Master
516-822-4466x101; zkm@aisww.com

Charles Schwab - Andrew Magnus
212-403-9216; Andrew.Magnus@Schwab.com

Dunham & Associates—Shannon M. Evans
858-964-0500; Shannon.evans@dunham.com

JP Morgan Asset Mgmt - Melissa Lannon
917-575-3958; Melissa.Lannon@jpmorgan.com

In adherence to the FPA's Open Forum Policy, the Financial Planning Association of Long Island welcomes advertisements from reputable suppliers of products and services to the financial planning community. However, the chapter's Board of Directors does not perform due diligence on advertisers or authors and cannot guarantee that their offerings or writings are suitable or correct.

The Heart of Financial Planning:

Being the community that brings together those who deliver financial planning, those who support it and those who benefit from it.

Programs / Education Committee

Anthony F. Papa, CFP® ● Programs / Education Director

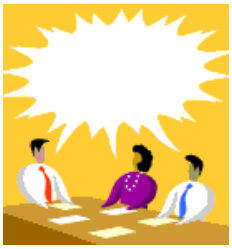
Committee Members: Michael Baras, Richard Bergen, Barry Eckstein, Diane Wilkie

The next meeting of the Programs & Education Committee will be held on Friday, **August 7, 2009.** At this meeting we will discuss and plan out the topics and speakers for our upcoming chapter's meeting year. Anyone interested in participating on this committee please contact Tony Papa at 516-536-4436 or email him at afpapa@ae.cadaretgrant.com. If you can't make this meeting but have ideas to share or suggestions to make please let Tony know. Below is a list of the dates for September 2009 through June 2010. We hope you can join us!

SCHEDULE OF MONTHLY MEETINGS, SEMINARS AND EVENTS
September 2009 through June 2010

September 16, 2009	Presentation by Howard Eilen on compliance for financial advisors
October 7, 2009	Required CFP® Ethics course, presentation by Linda Gadowski
November 17, 2009 (Tuesday)	Presentation by Michael Moss, CPA, Esq., on Roth IRA's
December 16, 2009	Year in Review—Panel Discussion
January 8, 2010	Tax Update Educational Seminar
January 20, 2010	TBA
February 24, 2010	TBA
March 24, 2010	TBA
April 21, 2010	TBA
May 7, 2010	Educational Seminar for NYS Insurance continuing education credits
May 19, 2010	TBA
June 16, 2010	TBA

Program Meeting Round Tables offer a great way to meet and network with other members!



Anyone interested in hosting a discussion at a Round Table prior to our monthly program meetings should contact the Chapter Office at 516-542-2004, or send an email to fpali@optonline.net and let us know what month you would be available and what topic you would lead.

These Round Table Sessions are held at our Monthly Program Meetings from 5:30 to 6:00 PM. They are open discussions on topics facilitated by members of the Chapter who have a degree of knowledge in the topic area.

A great way to meet other members and network!

WE NEED VOLUNTEERS, PLEASE SIGN-UP!

Would you like to get involved with the FPA of Long Island?

The FPA of Long Island is holding a program committee meeting to discuss ideas and speakers for future meetings. This committee meets approximately four times a year. We would welcome your ideas and participation at our meetings. The next committee meeting will be held on **Friday, August 7, 2009.**

If you would like to attend please call or email Tony Papa at 516-536-4436 or afpapa@ae.cadaretgrant.com for the time and place of this meeting.

Free Guest Pass

Do you have an associate or colleague who is thinking about joining the FPA, but wants to experience a chapter meeting first?

One free guest pass is available to any person who has never attended an FPA of Long Island chapter meeting. (All free guests passes must be coordinated through Janet Cino, 516-542-2004.)

Symposium & Exhibition Committee

Joseph W. Fleischman, CFP® ● Symposium & Exhibition Director
Alan Borko, Maryann Capone & Sandy Joel Siff ● Co-Directors

Committee Members: Herb Barnes, Michael Baras, Rich Bergen, Jack Chite, Craig Ferrantino, Jim Graziano, Moss Kaufman, Mike Kresh, Robert Larsen, Craig Marcott, Tommie Michalik, Diane Wilkie

SYMPOSIUM 2009

Sign-Up Today!

A Huge ***"Thank You"***
to the Sponsors & Exhibitors
who generously contribute to
make this program possible!
The following list represents sponsors
signed up as of June 2009.

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Charles Schwab
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Silver Level
Allianz Life Insurance
Amsterdam at Harborside
Cole Real Estate Investments
Fidelity Investments
Lord Abbett & Co. LLC
National Integrity
Planco / Hartford
Putnam Investments
Scher Financial Group / MetLife
Transamerica

Sponsorship opportunities
are still available.
If you would like details on
sponsoring call Tommie Michalik
*at **631-845-5100***

Symposium & Exhibition 2009
Mark your calendars now!
Friday, October 30, 2009,
Crest Hollow Country Club, Woodbury, NY

The Symposium Committee has been working hard to put together topics and speakers for the premier annual event on Long Island: ***The 10th Annual Symposium and Exhibition of the FPA of Long Island!*** It will take place on Friday, October 30, 2009, at the Crest Hollow Country Club in Woodbury. All of our speakers and topics are already lined up for the day. Nationally known speakers **Fritz Meyer**, Senior Market Analyst, is InvescoAim's primary economic and markets analyst, and **Brian Levitt,** the Corporate Economist at OppenheimerFunds, Inc., will be our Keynote and Luncheon Speakers, respectively. You can look forward to Bob Katz starting things off as our pre-conference speaker, by presenting his very timely Tax Update session. Vincent Russo will return offering two sessions, one the *ABC's of Government Benefits* and the second *My Favorite Flavor of Trust with Sprinkles on Top*. Morris Glazer will also be back this year covering *Cash Balance Plans*. We also have many other fine speakers and topics lined up for the day.

In addition to the find education you receive at the annual symposium it is also a great opportunity to meet up with old colleagues, meet new ones, speak with your peers and our partners to find out the best way to help us help our clients in this ever challenging economic environment.

The full Symposium agenda is included on the following page, so be sure to look it over. Use the registration form included there to sign up today. The Symposium brochure is in the process of being printed and is scheduled to be mailed to all members sometime this summer.

You will once again be able to earn up to 8 CFP and/or CPA credits during the day. You will also be able to earn 2 hours of NY State Insurance CE credit.

We expect to have 300 people in attendance again this year. Some sponsorships are still available, so sign up now to reserve your space.

Anyone wishing to get involved in this chapter might consider joining the Symposium Committee, there are many opportunities to help out. We can always use assistance at the event with moderating in each session, or maybe you would like to take photographs at the event, and we can always use extra hands the night before at our famous "Stuffing Party." Anyone one interested in joining the committee should give me a call at 631-845-5100 or email me at jfleischman@vanderbiltsecurities.com.

I'm looking forward to seeing you on October 30th!

Joseph W. Fleischman, CFP®
Director of Symposium 2009

Congratulations to Alan Cohn!

The winner of our "Guess the Close of the DOW" Contest
His guess of 8,022 for the close of the Dow on April 15th
was the closest of any Symposium registrant to
the actual close of 8,029.62 that day.
He has won a free Symposium registration!

Fritz Meyer Brian Levitt Bob Katz Vincent Russo

SYMPOSIUM & EXHIBTION 2009

October 30, 2009 — Crest Hollow Country Club, Woodbury, NY

7:30—9:00 AM	**Registration**
8:00—9:00 AM	**Pre-Conference Session** (1 CFP* and/or CPA CE credit) *Tax Update*: Robert Katz, Esq.; Katz, Bernstein & Katz
8:00—9:30 AM	**Exhibit Hall Open—Breakfast with Exhibitors**
9:30—10:30 AM	**Opening General Session** (1 CFP* and/or CPA CE credit) Keynote Speaker: **Fritz Meyer; Senior Market Analyst, InvescoAim**
10:30—11:00 AM	**Exhibit Hall Open—Break with Exhibitors**
11:00—11:50 AM	**Concurrent Session I** ►*The ABCs of Government Benfits* (1 CFP* and/or CPA CE credit) Speaker: Vincent Russo, Esq.; Vincent J. Russo & Associates, P.C. ►*Restructuring of the Credit Markets* (1 CFP* and/or CPA CE credit) Speaker: Scot Johnson, CFA, Senior Client Portfolio Manager ►*Investor Behavior* (1 CFP* and/or CPA CE credit) Speaker: C. Monica Capra, Ph.D., Department of Economics, Emory University
11:50 –12:10 PM	**Exhibit Hall Open—Break with Exhibitors (first Raffle)**
12:10—1:00 PM	**Concurrent Session II** ►*My Favorite Flavor of Trust with Tax Sprinkles on Top* (1 CFP* and/or CPA CE credit) Speaker: Vincent Russo, Esq.; Vincent J. Russo & Associates, P.C. ►*Restructuring of the Credit Markets—Part II* (1 CFP* and/or CPA CE credit) Speaker: Scot Johnson, CFA, Senior Client Portfolio Manager ►*Investor Behavior-Part II* (1 CFP* and/or CPA CE credit) Speaker: C. Monica Capra, Ph.D., Department of Economics, Emory University
1:00—2:30 PM	Lunch (1 CFP* and/or CPA CE credit) Luncheon Speaker: **Brian Levitt, Corporate Economist, OppenheimerFunds, Inc.**
2:30—2:50 PM	**Exhibit Hall Open—Raffle**
2:50—3:40 PM	**Concurrent Session III** ►*Life Settlements* (1 CFP* and/or CPA CE credit) Speaker: Stephen J. Shorrock, President, LifeVentures Corp. ►*Tax Overlay Management* (1 CFP* and/or CPA CE credit) Speakers: Edward F. Nelson, MBA, CIMA; and John G. Phoenix, CEO and President Metamorphosis Money Management.
3:40—3:50 PM	Afternoon Break
3:50—5:30 PM	**Post Conference Sessions** ►*Cash Balance Plans;* (1 CFP* and/or CPA CE credit and/or 1 NYS Ins. Credit) Speaker: Morris Glazer; Regional VP, Transamerica Retirement Services ►Topic TBA: (1 CFP* and/or CPA CE credit and/or 1 NYS Ins. Credit) Speaker: Jeff Soares

*All continuing education (CE) credits must be reviewed and approved by CFP Board. Information displayed is contingent on approval by CFP Board; CE credit is not guaranteed. Onsite materials will indicate final approval for session CE credit.

10th Annual Symposium & Exhibition

October 30, 2009 - Crest Hollow Country Club, Woodbury, NY

Name: _____ Email: _____

Company: _____ Phone: _____

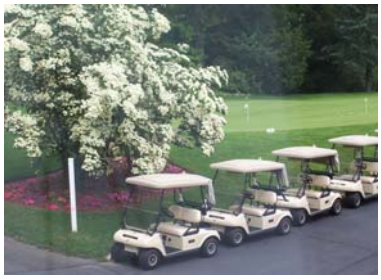
Address: _____

CFP License #: _____ NYS License #: _____

Rates:			
	5/8/2009 to 10/16/2009	Member: $150.00;	Non-Member: $220.00
	10/17/2009 to 10/30/2009	Member: $200.00;	Non-Member: $270.00

Return to FPA of Long Island, 1895 Lincoln Ave, East Meadow, NY 11554-2522.

A full refund will be granted as long as you contact us by October 16, 2009.
Refunds will **not** be granted after October 16, 2009, however substitutions can be made at any time at no charge.



The Scott Hirschbein Memorial Golf Outing

Was Held on Monday, June 15, 2009

The Hamlet Wind Watch Golf and Country Club
Hauppauge, NY

The Annual Scott Hirschbein Memorial Golf Outing was held on June 15th at the Hamlet Wind Watch Golf Course. The day began with rain which scared off a few golfers, but the sky cleared and the outing went on and was enjoyed by all. Many thanks to Tim Rossiter our committee chair, he did a great job in putting this year's outing together!

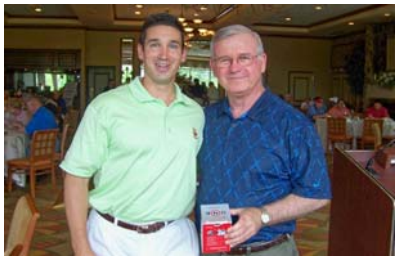
Congratulations to all of our contest winners this year!

The award winners were as follows:
Low Gross Men: Anthony Camilleri;
Low Gross Women: Terry Williams;
Low Team Gross: Anthony Camilleri, Jeff London and Don Gehrig;
Low Team Yellow Ball: Tim Rossiter, Dan Jennings, Tom Dunleavy and Alain Brussey;
High Gross Men and Women (or Most Honest Golfer): Keith Carravone and Julie Boliver;
Closest to the Pin: Rich Bergen and Terry Williams;
Closest to the Center: Todd Dudonis and Terry Williams;
Long Drive: Bill Sheluck and Bernadette Hoban.

Many thanks to all of our Partners and special thanks to:
Breakfast Sponsor - Stephen Burke with Jackson National
Lunch Sponsor - Wendy Ehrlich with Oppenheimer Funds
Awards Sponsor-Andrew Magnus with Charles Schwab
Contest Sponsor-Melissa Lannon with J.P. Morgan Asset Management

Tee Sponsors
Annuity Depot Agency, Delaware Investments,
DWS Investments, Franklin Templeton Investments,
Invesco Aim, MainStay Investments,
MFS Investment Management, and Nationwide

We cannot thank our sponsors enough, their support allows us to run these great events. Please thank them whenever you see them for their support. We hope to see all of you again at next year's outing!



Get Involved with the FPA of Long Island!

The FPA of Long Island's Board of Directors welcomed members new to the chapter at a cocktail party held on June 17th prior to the monthly program meeting. It was a great opportunity for the board to meet members of the chapter, and new members to find out more about this great chapter, what events we have planned, who are the leaders of FPA of Long Island are and how anyone can get involved. Below is a list of committees and the name and phone number of the person in charge. If you would like to get more active in the chapter please give a call to any one of the committee chairpersons listed below, new ideas and committee members are always welcome.

FPA LI COMMITTEES

The following is a list of the standing committees for the Chapter. We encourage you to get involved and help wherever your interest may lie. Some people have indicated an interest in serving on the Board of Directors of the Chapter, but please be advised that we do have a requirement whereby members must serve on a committee before being considered for the Board.

Please fell free to contact the individual Committee Director or the Chapter Office, if you wish to offer your time or input.

Chapter Preident—Michael Kresh	631-232-9170
Programs – Tony Papa	516-536-4436
Symposium – Joe Fleischman	631-845-5100
Journal/Directory - Jim Graziano	631-656-8884
Sponsorships - Tommie Michalik	631-845-5100
Membership – Paul Schifter	631-366-1999
and Scott Sanders	516-938-5219
Communications, Public Awareness & Public Relations - Michael Baras	516-481-0994
Ethics - Ray Mignone	718-229-2514
Pro Bono - Rich Bergen	516-741-1430
Fee Advisor Group - Andrew Rich	516-433-0828
Focus Groups - Craig Marcott	631-286-1061

Membership

Welcome New Members
March - May 2009

Gerry Barrasso
United Financial
Planning Group LLC
Hauppauge, NY

Nancy Bendig
Northport, NY

Michelle Buonincontri
Commack, NY

Lainelle K. Castro
Dix Hills, NY

Jody W. Cavalier, ChFC
Lincoln Financial Group
Syosset, NY

Christopher Danzer
Port Washington, NY

Nicholas R. Egger
Principal Financial Group
Centerport, NY

Matthew J. Fallon
Ameriprise Financial
Mitchel Field, NY

Carl A. Friedrich
Wall & William
Financial Service Group
Rockville Centre, NY

Richard T. Seeger, CFP®
Fidelity Investments
Lindenhurst, NY

Sophia E. Tzemis
Merrill Lynch
Garden City, NY

Anniversaries

Congratulations to the following Long Island Chapter FPA members who are celebrating significant FPA anniversaries in March—June 2009.

Members for 25 Years

Charles Eggleton, ChFC, CFP®	Kings Park, NY	March 1, 1984
Diana L. Fletcher, CFP®	Melville, NY	April 1, 1984
Peter Paul Ostapow, CFP®, CLU, ChFC	Setauket, NY	May 1, 1984
William A. Levine, CFP®	Melville, NY	May 1, 1984
Loretta M. Vosseler, CFP®	Great Neck, NY	June 1, 1984
Jack Chite, CFP®	Sayville, NY	June 1, 1984

Members for 20 Years

Ronald W. Rogé, CFP®	Bohemia, NY	March 27, 1989
Robert E. Bertucelli, CFP®, CLU, CPA	Jericho, NY	May 1, 1989
James H. Tinnelly, CFP®	Syosset, NY	May 22, 1989
Dennis P. Clark, CFP®	Long Beach, NY	June 1, 1989
Anthony R. Schiavi, CFP®	Bayside, NY	June 1, 1989

Members for 15 Years

Madeline C. Braisted, CFP®	Bayside, NY	March 1, 1994
Myron Feinberg, CFP®	Commack, NY	March 7, 1994
Donald J. Harnett, CFP®, CPA	Massapequa Park, NY	May 9, 1994
David A. Kamlet	Woodbury, NY	June 1, 1994

Members for 10 Years

Raymond D. Mignone, CFP®	Little Neck, NY	March 3, 1999
Charles L. Schlapp, CFP®	Jericho, NY	March 10, 1999
Attahjundwe Obiajulu, CFP®, CLTC	Syosset, NY	March 31, 1999
Kathleen Neill, CFP®	Bayport, NY	May 6, 1999
Roger E. Pinto, RFC	Huntington, NY	May 17, 1999
Vincent R. Stempien, CFP®	Manhasset, NY	May 17, 1999
Rosanne Rogé, CFP®, CSA, RFG	Bohemia, NY	June 16, 1999
Rajendra Prashad, CFP®, CLU, ChFC	Ozone Park, NY	June 23, 1999
Clifford R. Raynor, CFP®, EA	Greenlawn, NY	June 25, 1999

Members for 5 Years

Peter McGeough, CFP®	Huntington, NY	March 12, 2004
Stuart E. Markowtiz, RFC	Lynbrook, NY	March 11, 2004
Mary K. Houck, CFP®, EA	Oceanside, NY	March 11, 2004
Mark S. Holt	Huntington, NY	March 17, 2004
Brett J. Testerman	Garden City, NY	March 18, 2004
Gabriel J. Castillo	Huntington, NY	March 22, 2004
Dean Stephens	Seaford, NY	April 12, 2004
Thomas A. Boggiano, CFP®	Neponsit, NY	April 22, 2004
Francis X. Becker, Jr., CFP®, ChFC	Lynbrook, NY	June 1, 2004

Submit Nominations for 2009

THE HOWARD BLACK MEMORIAL AWARD
FOR
ACHIEVEMENT AND EXCELLENCE IN FINANCIAL PLANNING

This award has been presented annually since 1993, in memory of Howard Black, JD, CFP, ChFC, who passed away suddenly in 1992. He was a special person in the Long Island financial planning community, and served on the board of the LI-IAFP. Howard was a colleague, teacher, advisor, mentor and friend to many. These talents he gave freely, without reserve. He was truly a role model for our financial planning community. Beyond his professional excellence and achievement, he exemplified the epitome of ethics and principle. To honor his memory, this award was established by those in our organization that he touched in countless ways. It is intended to be a prestigious recognition given to an outstanding member of the Long Island financial planning community.

THE AWARD: The award was initially presented by the Board of Directors of the Long Island Chapter of the IAFP. Following the merger of the IAFP and the ICFP, the decision was made to continue this tradition in the memory of a notable contributor to the Long Island financial planning community. The award is administered by the Past Presidents Council of the Long Island Chapter of the FPA. The Council includes past presidents of the former LI-IAFP Chapter, the former LI-ICFP Society, and the newly formed LI-FPA.

NOMINEE QUALIFICATIONS:

- Active membership in the Long Island Chapter of the Financial Planning Association (FPA)
- Noteworthy Service and Contribution to the Financial Planning Profession
- Noteworthy Service to the Public
- Adherence to High Ethical Standards

> Nominees are not required to be practicing financial planner professionals, and might be from other allied professions or academic disciplines with strong financial planning focus.

NOMINATION FORM
Must be Submitted by August 31, 2009

I. Nominees Name: _____

Address: _____ City / State / ZIP: _____

II. Professional Designations Held: _____

III. Professional Organization Membership: _____

IV. Service and Contribution to the Financial Planning Profession: ***(Describe in attachment)***

( ) Lecturer ( ) Teacher / Instructor ( ) Authorship ( ) Boards/Committees ( ) Other

V. Service to the Public: ***(Describe in attachment)***

( ) Civic ( ) Charitable / Volunteer ( ) Other:

VI. Has Nominee signed a Code of Ethics Pledge? Y / N With whom?_____

VII. Has Nominee received any Complaints or Compliance citations? Y / N ***(If yes, attach explanation)***

VIII. Three Other Financial Planning Professionals to Whom Nominee is known: ***(Provide Contact Information)***

1. _____
2. _____
3. _____

IX. Special Remarks (Please attach)

Date of Submission: _____ Submitted By: _____ **

***** Not Required / Nomination may be submitted anonymously***

SUBMIT THIS FORM TO: The Past Presidents Council, The FPA of Long Island,
1895 Lincoln Avenue, East Meadow, NY 11554-2522; Ph: 516-542-2004 / FAX: 516-542-2005

All nominations must be submitted by August 31, 2009.
The Award will be presented at the FPA of Long Island's Symposium on October 30, 2009.
We hope all members will aspire to nominate a colleague of themselves for this prestigious recognition of their peers.

FINANCIAL PLANNING ASSOCIATION

The Heart of Financial Planning™

FPA Member Advantage Program

You asked and we listened.

In a survey conducted earlier this year, we learned that member discounts are an important part of the membership experience. As a result, we're pleased to announce the launch of our new ***Member Advantage Program.*** This program connects members with quality product and service providers and allows you to take advantage of members only savings. Start saving today with these discount providers:

Long Term Disability Insurance
Enjoy savings up to 50% on Long Term Disability Insurance provided through Ryan Insurance Strategy Consultants.

Errors and Omissions Insurance
Save five percent and receive quality coverage and excellent customer service through the Cambridge Alliance. Coverage has been offered through this provider since 1988.

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FPA of Long Island Upcoming Meetings

Schedule of Monthly Meetings, Seminars and Events
All monthly program meetings will be held 5:30 p.m. – 8:30 p.m.
At the Crest Hollow Country Club in Woodbury, NY

♦ **September 16, 2009**	**Monthly Program Meeting– Compliance for Financial Advisors**
♦ **October 7, 2009**	**Required CFP® Ethics Course**
♦ **October 30, 2009**	**10th Annual Symposium and Exhibition**
♦ **November 17, 2009**	**Monthly Program Meeting—Roth IRA's**
♦ **December 16, 2009**	**Monthly Program Meeting — Year in Review—A Panel Discussion**
♦ **January 8, 2010**	**Educational Seminar: Tax Update Meeting, at the Carlyle on the Green, Farmingdale, NY**
♦ **January 20, 2010**	**Monthly Program Meeting —**
♦ **February 24, 2010**	**Monthly Program Meeting—**
♦ **March 24, 2010**	**Monthly Program Meeting —**
♦ **April 21, 2010**	**Monthly Program Meeting —**
♦ **May 7, 2010**	**Educational Seminar: For NYS Insurance CE, at the Carlyle on the Green, Farmingdale, NY**
♦ **May 19, 2010**	**Monthly Program Meeting—**
♦ **June 17, 2010**	**Monthly Program Meeting—**
♦ **June 21, 2010**	**Annual Scott Hirschbein Memorial Golf Outing, Hamlet Wind Watch, Hauppauge**

Visit our web site at www.fpali.org
Registration forms can be downloaded for our different events

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