THE PLANNER

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Email: fpali@optonline.net www.fpali.org

"A Gold Level Chapter"

Dear Fellow FPA Member:

Greetings and Happy Spring! I know everyone is looking forward to the warmer weather. The next few months prior to our summer break will contain some interesting educational and networking opportunities with monthly meetings covering Special Needs Trusts, Alternative Investments and Understanding Credit. Also don't forget the special meetings of: Andy Rich's Fee Advisor Group, an intensive one day Insurance Program and of course the June 18th Golf Outing expertly run by Jim Meyer.

FPA Court Win On The "Merrill Lynch Rule" – As you are aware by now the U.S. Court of Appeals for the District of Columbia Circuit ruled in FPA's favor in its lawsuit, filed July 2004, against the Securities and Exchange Commission (SEC) regarding the Broker-Dealer Rule. This rule provided a special exemption to certain broker-dealers from the fiduciary requirements of the Investment Advisers Act of 1940.

FPA national has fought this ruling to force an equal playing field between independent RIAs and the large brokerage firms. In affect the court's decision forces the broker-dealers to stop selling fee-based accounts and advice without having to register as advisors and being fiduciaries. This is an excellent example of the benefits of being a member of the FPA and our ongoing government relations' activities.

Passing Of Marie Rolston – Since our last newsletter we sadly lost Marie Rolston our own Government Affairs Director. Marie has been an active board member of the Long Island FPA chapter for many years. She dedicated many hours helping the chapter and volunteering at FPA events.

We will truly miss Marie's smiling face and positive attitude. She actively participated in our monthly board meetings and was always willing to lend a hand at the symposium and monthly meetings. She was a good FPA member and a good friend to many members.

Best Regards,
Raymond D. Mignone, CFP®

FPA
FINANCIAL PLANNING ASSOCIATION
The Heart of Financial Planning™

What's Happening —

Announcements from the Editor

> Our next program meeting will be held on **Wednesday, May 16th** from 5:30 to 8:30 PM at the Crest Hollow Country Club.

> ***Save The Date***: The Annual Scott Hirschbein Memorial Golf Outing will be held on Monday, June 18, 2007, at the Hamlet Wind Watch, Hauppauge, NY. See page 7 for a registration form.

> Our next Annual Symposium and Exhibition will be held on **Friday, October 26, 2007** at the Crest Hollow Country Club, Woodbury, NY. **Register before May 11th for the Early Registration Discount!**

> Nominate a colleague or yourself for the prestigious **Howard Black Award**! Nominations must be submitted by **August 31, 2007**. For more information and/or a nomination form contact the chapter office, 516-542-2004.

> Please check the back cover for the schedule of monthly meetings, seminars and chapter events, or 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.

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.

Many Thanks to Our 2006-2007

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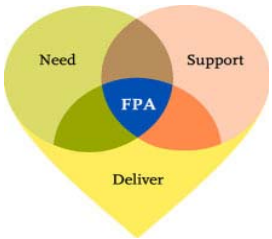
631-454-6059; mefrail@verticallend.com

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.



A Tribute to Marie Rolston

Submitted by Frank Giangrande

Marie Rolston entered her first financial planning class at Adelphi University in January of 1987. Prior to that time, Marie had been an Educator; a Special Education teacher and a Principal of a Boces School in Suffolk County.

Upon leaving the field of Education, she became a Certified Financial Planner. Marie started her financial planning work with Andy Rich, a past president of the IAFP (now the FPA). Later, she joined Joe Clinard at the North Ridge Securities Corporation. She had been a representative at that firm until her death, March 18, 2007. Marie worked mostly with people who were preparing to retire, helping them with their retirement plan choices and decisions. People could rely on Marie for honest and direct answers to their problems. She was always ready to lend a hand whether you were a client of hers or not.

At the outset, Marie joined the International Association of Financial Planning (IAFP now the FPA) and quickly volunteered for many of the board functions. She had worked tirelessly at all of her duties, the last of which was Director of Government Affairs. In addition, Marie worked along with many of the FPA committees, always bringing her mild temperament and boundless energy to the table. She was never asked for help where she said anything but "I'll take care of it." She had been a fixture of the FPA of Long Island's Symposium Committee, which is the FPA's annual showcase event, indeed, without her presence it will not be the same.

During all of this time Marie raised her two children as a single Mom.

Marie never failed to qualify as a Top Producer for the North Ridge Securities Corporation and attended all of their conferences as a Top Producer. One of her fun hobbies was to play the Slot Machines in Atlantic City. Many of us fondly remember the annual IAFP / FPA sponsored Bus Trips to Atlantic City, which she attended faithfully.

She will be missed by everyone who knew her.

Joe Clinard, her teacher at Adelphi, her mentor, and friend says he was very fortunate to have been touched by her. Haven't we all been!

Everyone on the Executive Board of the FPA of Long Island, and I am sure all of the membership of our organization, know she will be rewarded in heaven for having helped so many people in her life.

Submit Nominations for

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, 2007

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, 2007.
The Award will be presented at the FPA of Long Island's Symposium on October 26, 2007.
We hope all members will aspire to nominate a colleague of themselves for this prestigious recognition of their peers.

FPA of Long Island
8th Annual Symposium & Exhibition

Friday, October 26, 2007
Crest Hollow Country Club
(One-day, all-day format)

MEMBER APPRECIATION EARLY REGISTRATION FORM

Please return this registration form and a check for the $125 fee (members) or $195 (non-members), made payable to the Financial Planning Association of LI, to:
FPA of Long Island, 1895 Lincoln Ave., East Meadow, NY 11554.
Member appreciation registration deadline: May 11, 2007.

Last Name _____ First Name _____

Company Name _____ Badge Name (Preferred Name) _____

Address _____

City _____ State _____ Zip Code _____

Work Phone ( ) _____ FAX No. ( ) _____

E-mail _____ Home Phone No. ( ) _____

I am a (please check): _____ FPA Member _____Non- Member

License Number (if applicable): CFP _____ NY Insurance _____

Registration Periods/Dates	Member Fee	Non-Member Fee
Early Registration ..on or before 5/11	**$125***	**$195***
Regular Registration…..5/12 - 10/12	$150	$220
Late Registration……10/12 - 10/26	$200	$270

* - plus $10 off chapter coupon.

You will receive the complete Symposium program, as well as a schedule of the concurrent and seminar sessions in the mail sometime this summer. You will be able to select the particular concurrent and seminar sessions you would like to attend at that time. If you should have any questions in the meantime, please call the Chapter Administrator, Janet Cino, at (516) 542-2004.
Thank-you for your registration!
www.fpali.org

Congratulations!

This year we had two winners of the "Guess the Close of the DOW "Contest.
Congratulations to Lee Zagame and Scott Kaplan!
They both guessed that the close of the Dow on April 13th would be 12,614 and the actual close was 12,612. They each win a free symposium registration.
Congratulations and we hope you enjoy this year's Symposium.

Membership

Welcome New Members
February - March 2007

Thomas A. Addison
MetLife
Hauppauge NY

Andrew F. Bertalli
TIAA-Cref
Mineola NY

Joseph M. Favorito
Fidelity Investments
Port Jeff Station NY

Charles R. Friedlander
Smith Barney
Rockville Centre NY

Richard R. Groom
Janus INTECH
Wantagh NY

Sazeeda H. Itwaru
Queens Village NY

Alex A. Karavousanos
Ariston Advisors LLC
New Hyde Park NY

Robert L. Levine
Spielberger Dampf Brill & Levine
Jericho NY

John S. Patsy
Holbrook NY

Michael F. Pellman
Morgan Stanley
Riverhead NY

Christopher Reilly
Fidelity Investments
Cold Spring Harbor NY

Michael Ross
AXA Advisors
New Hyde Park NY

Michael Schiffer
Morgan Stanley
Jericho NY

M. Matthew Sengsourinh
Westco Financial
Lynbrook NY

John F. Tweedy
Tweedy Financial Services, LLC
Floral Park NY

Jamie D. Weil
RBC Dain Rauscher
Jericho NY

Richard E. Zacharoff
Huntington NY

Anniversaries

Congratulations to the following Long Island Chapter FPA members who are celebrating significant FPA anniversaries in March—April 2007.

25 Years

Edward J. Mockler, CFP®	Uniondale	NY	March 1, 1982
Edward M. Taylor, CFP®	Jericho	NY	March 1, 1982

20 Years

Denis Kean Murphy, CFP®	South Hempstead	NY	March 9, 1987

10 Years

Neil G. Carousso, CPA, CFP®	Whitestone	NY	March 5, 1997

5 Years

Arthur J. Springer, CFP®	Seaford	NY	March 5, 2002
Christopher Zarra, CFP®	Rockville Centre	NY	March 11, 2002
Joe E. Hatzfeld, CFP®	Hauppauge	NY	March 12, 2002
Robert Rom, CFP®	Mineola	NY	March 15, 2002
Henry D. Davidson, CFP®	Mitchel Field	NY	March 29, 2002
Jeffrey R. Banser	Hauppauge	NY	April 11, 2002
Kevin R. McGrane, CFP®	Woodbury	NY	April 25, 2002
Philip J. Capell, CFP®, JD	Woodbury	NY	April 30, 2002

FINANCIAL PLANNING ASSOCIATION

The Heart of Financial Planning™

The Scott Hirschbein Memorial Golf Outing

Monday, June 18, 2007

The Hamlet Wind Watch Golf and Country Club
1715 Vanderbilt Motor Parkway
Hauppauge, NY

Registration is on a First-Come Basis, with FPA Members having priority until May 18, 2007. Maximum number of Golfers: 100 Registrations accompanied by full payment will be handled on a first come, first served basis. Act now to avoid disappointment!

The Fee for the Golf Outing is $150 per player and includes:
Golf Fee (Shotgun Start), Cart, Breakfast, BBQ Lunch,
Locker Room, Awards, Promotional Giveaways, Driving Range

6:30 am	Sign-in and Full American Breakfast
7:45 am	Shotgun (Report to 1st Tee Promptly)
12:30 pm (approx)	Cocktails, BBQ Lunch & Awards Following

SOFT SPIKES REQUIRED AND DRESS CODE ENFORCED (Collared shirts required) We will, as always, strictly enforce the double par maximum scoring on each hole. Please cooperate so that play moves along.

>>>

2007 Golf Outing Registration Form

of Golfers _________ x $150 = Total Amount Enclosed $_______________

If signing up for more than yourself, indicate playing partners' names below:

1. Name: ____ FPA Member Yes __ No __
   Telephone: ________________________ Email: ____________________________
2. Name: ____ FPA Member Yes __ No __
3. Name: ____ FPA Member Yes __ No __
4. Name: ____ FPA Member Yes __ No __

Mail form and check made payable to the "Financial Planning Association of LI" to: The FPA of Long Island, 1895 Lincoln Ave., East Meadow, NY 11554-2522. Play is rain or shine [we will call you if course is closed for any reason]. Cancellations up to May 18, 2007 50% refund, and after May 18, 2007, no refund.
Questions – Call Jim Meyer (631) 423-0505x308

FPA Visited Key Media and Chapter Leaders in New York

FPA President Nicholas A. Nicolette, CFP®, and Executive Director/CEO Marvin W. Tuttle, Jr., CAE, visited key media in New York at the end of March and then met with chapter leaders from the Long Island and Greater Hudson Valley chapters.

Media visited included *MONEY* magazine, the *New York Post, Investment Advisor* magazine, Dow Jones Newswires, *InvestmentNews*, Associated Press, *Financial Planning* magazine, *The Wall Street Journal*, BusinessWeek Television and *USA TODAY*.

Nicolette and Tuttle spoke on FPA's position on proposed changes to CFP Board's *Code of Ethics and Professional Responsibility* and FPA's proposed standard of care for financial planning clients. In addition, they addressed issues surrounding retirement planning and the rising costs of healthcare.

From the Long Island Chapter those present were Ray Mignone, our chapter president, Lou Cino, director of Symposium, Andy Rich, director of the Fee Advisor Group, Frank Giangrande, director of Communications, Michael Baras, director of Public Relations, and Janet Cino, our chapter administrator. Discussion was held on various issues in relation to local relations with our National organization. Nicholas Nicolette or Marvin Tuttle kindly agreed to attend our Annual Symposium on October 26, 2007 and to speak to our members at that time.

FPA Seattle 2007 has something for everyone: practitioners, broker-dealers, students, international financial planners, CFP® certificants, professional resource providers — anyone who needs, supports or delivers financial planning.

The diversity of education at FPA Seattle 2007 ensures that there is something for everyone at this conference. From nine educational tracks addressing everything from client trust and communication to insurance, to dynamic and motivational general session speakers, to pre-conference — and mid-conference — workshops that will engage and inspire, the FPA Seattle 2007 program has it all.

FPA Seattle 2007 also proudly boasts myriad continuing education opportunities. Attendees have the opportunity to earn up to 25 CFP Board CE credits, and many states are also offering state insurance CE credit. Visit the Web site for specific information www.FPAAnnualConvention.org.
Don't forget to register before the early-bird deadline on July 20 for a discounted rate!

Join the Fee Advisor Group

The FPA of Long Island is one of the few chapters that has a Fee Advisor Group. This group holds independent meetings that are of interest to fee advisors. *Save the date for our next meeting!* Our next meeting will be on **Tuesday, June 12th** as a Technology Workshop. Meeting announcements will be sent out soon.

The Fee Advisor Group is only open to FPA Long Island members who are Principals or employees of Federal and NYS RIA firms and registered reps whose BD firms have registered them with the SEC as Investment Advisor Reps (IAR's).

Our group uses a peer to peer networking approach where participants can learn from others about what they are doing and how they do it. Most meetings are designed as open forums and interaction is encouraged. If you need any information you may contact Andrew Rich, CFP®, the Fee Advisor Group V.P. (516-433-0828 or richadv@optonline.net).

Not a registered member of the Fee Advisor Group?

To register participants must meet any of the following:

1. A principal or employee of an Investment Advisor registered with the US Securities & Exchange Commission.
2. A principal or employee of an Investment Advisor registered with the NYS Department of Law.
3. A registered rep of a broker-dealer firm who is also registered as an IA Rep through the firms investment advisor affiliate.

In addition to any of the above, the participant must be a member of the FPA of Long Island Chapter. Please note only chapter members who are registered with the Fee Advisor Group will receive notice of meetings and events.

To register, complete the following and return to the Chapter Office.

I certify that I am:
_____ A principal or employee of an Investment Advisor registered with the US Securities & Exchange Commission
_____ A principal or employee of an Investment Advisor registered with the NYS Department of Law
_____ A registered rep of a broker-dealer firm who is also registered as an IA Rep through the firms investment advisor affiliate. List Broker Dealer: _____
_____

Print Name: _____

Sign: _____

Date: _____

Help Wanted

The Program Committee of the FPA of Long Island will be meeting a the end of May to begin planning the program meetings for September 2007 through June 2008.

This committee is looking for new people help in this process. They meet about six times a year to set up nine monthly program meetings.

All members are welcome to participate in this process. All ideas are welcome. We are always looking for topic suggestions and speaker recommendations.

Anyone interested should contact Joe Fleischman at 631-845-5100 or jfleischman@vanderbiltsecurities.com

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New Link on Social Security Online for Financial Planners

I'm thrilled to tell you that Social Security has launched a new link designed for financial planners. This site provides information to financial planners regarding the various Social Security programs and Medicare and is a valuable resource in helping your clients plan for retirement or other life events. I hope that FPALI's members will make use of these resources when responding to questions about Social Security's programs and benefits.
The link is
www.socialsecurity.gov/financialplanners.htm

Thanks and regards.
Everett M. Lo
Social Security Administration
New York Regional Public Affairs

For up-to-date information on Social Security's Programs and Benefits, visit www.socialsecurity.gov.

Save the Date!

Financial Planning Week 2007

The FPA annually celebrates Financial Planning Week each Fall to promote the concepts of financial planning. On Saturday, **October 20, 2007**, our chapter will be sponsoring the annual Senior Expo at Suffolk Community College's Brentwood Campus. Previous years experience have shown this is a popular, well attended event, they have enjoyed crowds of 8,000 -10,000 participants.

Volunteers are needed to staff the FPA booth and answer basic question related to financial planning and distribute informative brochures and souvenir items. Members are needed for 1-2 hour shifts throughout the morning and early afternoon. Speaking opportunities for our members and a chance to educate the public are also available.

If you are interested in participating, please send your availability to the chapter office (by email to fpali@optonline.net or fax to 516-542-2005).

Volunteer's Name: _____

Phone #: _____

Email: _____

Times Available:

8 AM _____	1 PM _____
9 AM _____	2 PM _____
10 AM _____	3 PM _____
11 AM _____	4 PM _____
12 PM _____	Anytime _____

I am interested
in a speaking opportunity: _____

Committee Chair:
Michael Kresh, 631-232-9170

We need new volunteers, please sign up for a meeting!

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 Art Dolega (718-205-2880 or visionfinancial@rcn.com) or the Chapter Office (516-542-2004, fpali@optonline.net) and let us know what month you would be available.

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.

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.

Education – Sandy Joel Siff	516-671-1099
Programs - Joe Fleischman	631-845-5100
Symposium – Lou Cino	516-678-5000x6357
Journal/Directory - Jim Graziano	718-848-7200
Sponsorships - Tommie Michalik	631-845-5100
Membership – Paul Schifter	631-366-1999
and Scott Sanders	516-938-5219
Communications - Frank Giangrande	516-889-7188
Public Awareness - Michael Kresh	631-232-9170
Public Relations - Michael Baras	516-481-0994
Government Affairs - Anthony Papa	516-536-4436
Ethics - Moss Kaufman	631-366-1999
Special Events - Jim Meyer	631-423-0505
Pro Bono - Rich Bergen	516-741-1430
Career Development - Maryann Capone	516-752-4178
Fee Advisor Group - Andrew Rich	516-433-0828
Study Groups - Craig Marcott	631-286-1061

IN MEMORY OF OUR
DEAR FRIEND
AND ASSOCIATE

MARIE ROLSTON
1951 - 2007

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Candidate must have a High Degree of Honesty, Integrity,
Trust and a Solid Background with Outstanding
Listening, Written and Oral Communication Skills.

Must have a strong interest with a desire to transform and
grow professionally and personally. If interested,
fax qualifications to **631-777-1425.**

SELL / MERGE YOUR PRACTICE

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Contact Jeff Coffey, CFP @ 516-873-7777

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FREE GUEST PASS…

Do you have an associate or colleague who is thinking about joining, but wants to experience a chapter meeting first? One free guest pass is available to any person who has never attended a FPA Chapter meeting. (Coordinate attendance through the FPA Chapter Office, 516-542-2004.)

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

♦ **FRIDAY, May 4, 2007**	**2007 Spring Educational Seminar for NYS Insurance CE (The Woodlands, Woodbury)**
♦ **May 16, 2007**	**Monthly Program Meeting— Alternative Income Solutions—A Look at Structured Products**
♦ **June 12, 2007**	**Fee Advisor Group Meeting—Technology Workshop**
♦ **June 18, 2007**	**Scott Hirschbein Memorial Golf Outing Hamlet Wind Watch, Hauppauge**
♦ **June 20, 2007**	**Monthly Program Meeting—Understanding Credit**
♦ **October 6-7, 2007**	**Public Seminar / LI Fall Festival at Huntington**
♦ **October 20, 2007**	**Public Seminar / Senior Expo Suffolk Community College, Brentwood Campus**
♦ **October 26, 2007**	**8th Annual Symposium and Exhibition**

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

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FINANCIAL PLANNING ASSOCIATION
The Heart of Financial Planning™

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