THE PLANNER

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

"A Gold Level Chapter"

Dear Fellow FPA Member:

As of July 1st I am proud to take over as President of the Long Island Chapter of the FPA. Rich Bergen now becomes Chairman of the Board. Over the last two years Rich has done an excellent job in leading the chapter and board of directors. We all owe a great deal of thanks to Rich for the time and energy he spent away from his own business to run the chapter. He leaves the chapter in a sound financial position and with a well-motivated board of directors. I look forward to continuing to work with Rich in his new position as Chairman.

Strategic Planning Meeting – On August 2nd the board of directors met for its annual half day strategic planning meeting to discuss new ideas and ways we can make your membership in the FPA more beneficial, the chapter and monthly programs better. We kicked around several ideas that we hope to evaluate in more detail and be able to initiate over the next year, of course with all strategic planning meetings it is easy to come up with ideas and "wish lists" but harder to find the people willing to do the work to implement the ideas. We will try.

Some to the ideas we discussed were:

Public Relations – How can we bring more awareness to both the public and other professionals for the work that we do and the quality of the financial planners who are our members? While we have experienced members and good programs that can help the public, the FPA doesn't have much publicity on Long Island, we are looking at ways to change that. We formed a committee headed by Michael Baras to get some bids from public relations firms to work for the chapter. If anyone can recommend a PR firm with good contacts on Long Island please let Janet Cino or Michael Baras know or any board member.

Continued on Page 2

Board of Directors

2006-2007

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FPA®
THE FINANCIAL PLANNING ASSOCIATION

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, 2006**. See page 8 for more information and a nomination form.

> Our next program meeting will be held on **Wednesday, September 20th** from 5:30 to 8:30 PM at the Crest Hollow Country Club.

> ***Save The Date***: The CFP Requried Ethics Session will be held on **TUESDAY, October 10, 2006**, from 5:30 PM to 8:30 PM at The Crest Hollow Country Club, Woodbury, NY.

> Our next Annual Symposium and Exhibition will be held on **Friday, October 27, 2006** at the Crest Hollow Country Club, Woodbury, NY. Register before May 12th for the Early Registration Discount!

> 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.

President's Message
(Continued from Page 1)

Fun – We are also looking for more ways to have fun, either at some of our regular meetings or special offsite events. The feeling is that having members get together for some special events will help with member networking. Jim Meyer who runs the golf outings is our Director of Special Events and will be looking to come up with some more fun events for our members.

Increased Networking – We will try to improve the networking between members at our monthly meetings. Networking with other FPA members is one of the best benefits you could receive at our meetings.

New Board Members – I would like to welcome three new board members, Craig Marcott, Paul Schifter and Scott Sanders. It is good to have fresh faces and new ideas on the board. I look forward to working with them.

As we get ready to start a new year of monthly program meetings I look forward to meeting all of you and I would ask that if you have any ideas or suggestions on how to make the chapter better, please let me or any board member know.

Best Regards,

Raymond D. Mignone, CFP®

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.

Many Thanks to Our 2006-2007

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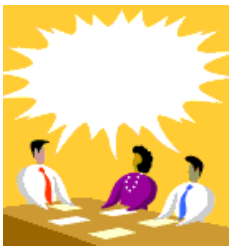
Program Meeting Round Tables offer a great way to meet and network with other members!



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.

Membership Report

By Moss Kaufman

Volunteers Needed to Represent the FPA at the Annual Long Island IRS Tax Symposium

For the past two years the FPA has been a partner and a participant at the annual three day tax symposium. The three day program is attended by accountants, financial planners, and tax practitioners coming from the Long Island metropolitan area. We need volunteers to represent the FPA at our booth as well as to assist the symposium sponsor in managing various sessions.

For the past two years, we have taken a booth and presented the benefits of financial planning and FPA membership to the attendees. Our volunteers had an opportunity to meet and follow up with prospective members. In addition, our representatives had had an opportunity to establish strategic alliances with attending accountants and tax practitioners. The program runs from November 15th through the 17th. Please contact Moss Kaufman at 631-366-1999 for more information.

Top 10 Benefits of Local FPA Chapter Membership

By: Howie Wiseman, CFP®

10. Education - 9 monthly educational meetings, required ethics course, a day long Annual Symposium and several half day mini symposiums provide an unparalleled opportunity to keep abreast of the latest developments in the field.

9. Required Credits – The Chapter's educational events provide the opportunity to acquire the CFP®, CPA, and insurance credits you need to maintain your designation and/or licenses.

8. Networking – with some of Long Island's most prestigious financial professionals.

7. Fee Advisor Group- Improve your investment process through interaction with this elite group of SEC and New York State RIA's and advisor representatives.

6. Enhance - the image of the CFP® designation, and increase public awareness of the financial planning process.

5. Job Bank – is available to members whether you're looking for a job or looking to hire.

4.Products and Services—maintain familiarity with cutting edge products and services offered through Chapter sponsors.

3. Chapter Services – A Chapter newsletter to keep you informed on local events, industry changes and job opportunities and a full time Chapter Administrator to help you get the most out of your membership.

2. Cost Savings– the member discounts available for Chapter educational meetings and social events effectively reduce the cost of your FPA membership – Discounts are available to a new member joining at the time of the event.

1. Your National Membership includes the cost of your local chapter membership.

Join Now -- Get Involved --!!

FPA
THE FINANCIAL PLANNING ASSOCIATION
The Heart of Financial Planning™

E-mail: fpa@fpanet.org
Web site: www.fpanet.org
800.322.4237

HELP FPA GATHER ETHICS FEEDBACK

July 25, 2006

Dear FPA® Chapter Leader:

As you are aware, CFP Board Monday released for public comment sweeping changes to its Code of Ethics and Professional Responsibility and the Financial Planning Practice Standards. FPA bylaws require members to comply with the principles of the Code of Ethics and Practice Standards. Whenever CFP Board proposes major changes, it affects our conditions for membership at FPA. While I do not want to rush to judgment in suggesting how these changes might affect not only our organization but the profession over time, my initial impression is that the changes would dismantle the high standards and credibility of the CFP marks that brought FPA together as an organization only six years ago. As proposed, it appears that the Practice Standards and the six-step process for financial planning would no longer exist as we know them; an on-again, off-again fiduciary standard would be created contingent upon whether the written agreement allowed a lower standard; and it also raises questions about whether the new rules would be applicable to a CFP® practitioner in a pro bono engagement.

I have numerous other concerns, but I don't think it is necessary to get into additional details at this point — you will find FPA's initial reaction in a news release and analyses posted on our Web site that provide some background. However, I assure you that FPA considers action on this proposal to be of the utmost importance and consequence to our emerging profession. I ask for your support and assistance in communicating the importance of these critical changes to the members of your chapter.

We are working to make every FPA member aware of the proposed changes, and we encourage everyone to respond with their own individual comments to CFP Board by the September 25 deadline for comment. In the meantime, you can help shape FPA's position on this critical issue. Share your thoughts and learn how your peers view the proposed changes. Join the national dialogue in FPA's Issues of the Profession online conversation room. FPA's volunteer Professional Issues Committee is examining the exposure draft in detail and will monitor the Issues of the Profession conversation while working closely with our Board of Directors in developing a formal position and comment letter.

You can find CFP Board's exposure draft at http://cfp-board.org/media/release.asp?id=142; FPA's executive summary of key changes at http://www.fpanet.org/member/govt_relation/new/index.cfm; and an FPA news release with reaction to the proposal at http://www.fpanet.org/member/press/releases/072406_ethics.cfm. Please post something about the proposed changes on your chapter Web site if possible. Together we can work to successfully communicate our concerns to CFP Board.

Thank you.

Daniel B. Moisand

Daniel B. Moisand, CFP®
President

Exciting Public Events are in the works!
Financial Planning Week 2006 ● October 2 - 8, 2006

Be sure to Mark Your Calendar! **Financial Planning Week is October 3 - 9th** this year and a number of exciting public events are in the works. The Long Island Chapter, along with chapters across the country, will be working to support the financial planning process and the promotion of financial literacy.

For the last three years our chapter was a sponsor of the 50 Plus Lifestyles & Senior Celebration Expo, a popular and well attended event. We participated in the opening presentations, held smaller seminars and hosted an exhibit booth at the event where we met and spoke with many of the 8,000 to 10,000 attendees.

This year, we plan to build on our successes of 2005, and also add new events that will create positive publicity for the financial planning process and our FPA Chapter. Events that are currently planned include sponsoring and hosting a booth at the 50 Plus Lifestyles & Senior Celebration Expo and hosting a booth at the 2006 Long Island Fall Festival. Both of these events need support from our members to volunteer to man the booths during the day and to present in the opening and classroom sessions at the Senior Celebration Expo. Any FPA members that would like to volunteer to participate in either or both of these events are encouraged to contact Janet (at the Long Island FPA Office) to volunteer. Email fpali@optonline.net, call 516-542-2005 or use the sign-up forms below.

Also be sure to tell all of your family, friends and clients about the Financial Planning Week events and help us make it a memorable week that educates the public about financial planning.

2006 Long Island Fall Festival
Saturday & Sunday, October 7-8, 2006
Heckscher Park

The Financial Planning Association of Long Island will be hosting a booth to inform the public of Financial Planning issues at the Huntington Chamber of Commerce Fall Festival on the week-end of October 7-8, 2006, during "Financial Planning Week". The booth will be open from 8 AM to 6 PM and member volunteers are needed to staff the booth throughout the day. If you are interested in helping staff the booth please fill out the form below and mail or fax it to the chapter office.

This is the largest fall festival attracting upwards of 200,000 people. We believe this is a great opportunity during Financial Planning Week help the public discover the value of financial planning and advance the financial planning profession.

Mail to: The FPA of Long Island
1895 Lincoln Avenue
East Meadow, NY 11554-2522

Or Fax to: 516-542-2005

Or Email to: fpali@optonline.net

Volunteer's Name: _____
Phone #: _____
Email: _____

Days Available: Saturday, October 7 _____
Sunday, October 8 _____

Times Available:

8 AM _____	1 PM _____
9 AM _____	2 PM _____
10 AM _____	3 PM _____
11 AM _____	4 PM _____
12 PM _____	5 PM _____
Anytime _____	

50 Plus Lifestyles & Senior Celebration Expo
Saturday, October 21, 2006
Suffolk Community College, Brentwood Campus

The FPA annually celebrates Financial Planning Awareness week each Fall to promote the concepts of financial planning. On Saturday, October 21, 2006, 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 — crowds of 8,000 -10,000 participants.

Thanks to those who have already volunteered for this year's event. More 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.

If you are interested in participating, please indicate on the form below what hours you are available and forward it to Janet in the chapter office, by email, mail or fax.

Mail to: The FPA of Long Island
1895 Lincoln Avenue
East Meadow, NY 11554-2522
Or Fax to: 516-542-2005
Or Email to: fpali@optonline.net
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 _____

Committee Chair: Michael Kresh, 631-232-9170

The FPA of Long Island Financial Planning Symposium and Exposition
Friday, October 27, 2006

7:30 - 9:00 a.m. **Registration**

8:00 - 9:00 a.m. **Pre-Conference Session *(1 CFP and/or CPA CE credit)***
Tax Update: Robert Katz, Esq.; Katz, Bernstein & Katz

8:00 - 9:30 a.m. **EXHIBIT HALL OPEN - Breakfast with Exhibitors**

9:30 - 10:30 a.m. **Opening General Session *(1 CFP and/or CPA CE credit)***

Panel of Mutual fund Managers: How to Make Money in Today's Environment
Panelists: Oliver Kratz, Manager, Global Thematic; Joan Sabella, Mainstay Funds; and Michael Pietronico, Managing Director and Senior Portfolio Manager, Evergreen Investments
Moderator: Jon L. Ten Haagen, CFP, RPC

10:30 - 11:00 a.m. **EXHIBIT HALL OPEN - Break with Exhibitors**

11:00 a.m. - 11:50 a.m. **Concurrent Sessions I**

- **Special Needs Planning *(1 CFP and/or CPA CE credit)***
  Speaker: Vincent Russo, Esq., Vincent J. Russo & Associates, P.C.
- **Features and Benefits of Annuities *(1 CFP and/or CPA CE credit and/or 1 NYS Ins. Credit, # NYCR-212541)***
  Speaker: Lorraine Lodes, AXA Distributors
- **Student Track-How to Pass the CFP Exam (No CE credit)**
  Speakers: Jack Chite CFP, and two students who have passed the CFP exam
- **Identity Theft *(1 CFP and/or CPA CE credit)***
  Speaker: Ronald L. Waldman, Senior Attorney, FTC, Northeast Region

11:50 a.m. - 12:10 p.m. **EXHIBIT HALL OPEN - Break with Exhibitors *(first Raffle)***

12:10 p.m. – 1:00 p.m. **Concurrent Sessions II**

- **Reducing Risk in Asset Allocation Portfolios *(1 CFP and/or CPA CE credit)***
  Speaker: Timothy S. Cronin, Senior VP, Prudential Investments
- **Social Security Update *(1 CFP and/or CPA CE credit)***
  Speaker: Jim McWilliams, Social Security Administration
- **Practice Mgt Track– Marketing Mistakes: Financial Planner Bloopers (No CE)**
  Speaker: Andrew Gluck, CEO of Advisor Products Inc
- **Overview of Qualified Plans *(1 CFP and/or CPA CE credit)***
  Speaker: William A. Schories, VP, Retirement Plan Consultant, Oppenheimer Funds

1:00 - 2:30 p.m. **Lunch *(1 CFP and/or CPA CE credit)***

Luncheon Speaker: "The Mindset of the Successful Advisor",
Bob Irish, Senior Vice President and National Speaker for American Funds Distributors

2:30 - 2:50 p.m. **EXHIBIT HALL OPEN - Raffle**

2:50 p.m. - 3:40 p.m. **Concurrent Sessions III**

- **Overview of Trusts *(1 CFP and/or CPA CE credit)***
  Speaker: Victor Finmann, Esq., Partner, Cullen and Dykman, LLP
- **Charitable Gifting with Insurance *(1 CFP and/or CPA CE credit and/or 1 NYS Ins. Credit # NYCR 213218)***
  Speakers: Jim Meyer, Vice President of the Heritage Group, LLC and Michael F. Greco, CLU, Principal, The Heritage Group, LLC
- **Health Savings Account *(1 CFP and/or CPA CE credit)***
  Speaker: Dave Clark, CLU, CPCU, Real Benefits Association

3:40 - 3:50 p.m. **Afternoon Break**

3:50 - 5:30 p.m. **Post-Conference Insurance Session**
(2 NYS Insurance Credits, #NYCR-203537, and/or CFP and/or CPA CE credits)

- **Advanced 401(k) Planning:** Speaker: Vincent Sama, Nationwide

Bob Irish Robert Katz Vincent Russo

SYMPOSIUM & EXHIBTION 2006

October 27, 2006 — Crest Hollow Country Club, Woodbury, NY

A Huge ***"Thank You"***
to the Sponsors & Exhibitors
who generously contributed to
make this program possible!

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Fred Alger & Co. Inc.
Annuity Depot
Columbia Funds
Diamond Hill Funds
Entrust Northeast, LLC
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Van Eck Global
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Sponsorship opportunities are limited. If you would like details on sponsoring call Tommie Michalik at 631-845-5100

Mark your calendars now for Friday, October 27, 2006, Crest Hollow Country Club, Woodbury, NY

The Symposium Committee of the FPA of Long Island has put together what looks like the best ever Financial Planning Symposium and Exhibition! It will take place on Friday, October 27, 2006, at the Crest Hollow Country Club in Woodbury. All of our speakers and topics are already lined up for the day. I am pleased to announce that Bob Irish, Senior Vice President and National Speaker for American Funds Distributors, has agreed to be our Luncheon Speaker. His talk will be on the "Mindset of the Successful Advisor". 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 be speaking on Special Needs Planning, Victor Finmann will be giving a giving a session on an Overview of Trusts, and Andy Gluck will be talking about Marketing Mistakes. We will also have many other fine speakers and topics lined up for the day.

The full Symposium agenda, with an outline of the sessions and session descriptions is available now on our website at: www.fpali.org. The Symposium brochure is in the process of being printed and is scheduled to be mailed to all members sometime in mid-July.

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 4 hours of NY State Insurance CE credit.

We expect to have over 400 people in attendance this year. Some sponsorships are still available, but we expect to sell-out soon. Register Now, if you haven't already! I'm looking forward to seeing you on October 27th!

Louis J. Cino
Vice-President, Symposium 2006

Symposium 2006:
October 27, 2006 - Crest Hollow Country Club, Woodbury, NY

Name: _____

Company: _____

Address: _____

City: _____ Zip: _____

Badge Name: _____ Phone: _____

Email: _____ Fax: _____

CFP License #: _____ NYS License #: _____

Rates:	5/13/06-10/13/06	10/14/06-10/27/06
Member	$150.00	$220.00
Non-Member	$200.00	$270.00

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

A full refund will be granted as long as you contact us by October 13, 2006. Refund will not be granted after October 13, 2006, however substitutions can be made at any time at no charge.

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, 2006

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, 2006.
The Award will be presented at the FPA of Long Island's Symposium on October 27, 2006.
We hope all members will aspire to nominate a colleague of themselves for this prestigious recognition of their peers.

The Gathering of the Global Financial Planning Profession

October 21-24, 2006 -
Nashville, Tennessee
Gaylord Opryland Resort & Convention Center

To stay competitive and position yourself for the future, FPA's annual conference is a must-attend for all financial planning professionals. FPA Nashville 2006 is the annual gathering for professionals in the worldwide financial planning community — and it's a total learning experience. The annual conference and exposition offers more choices for attendees to learn, connect with other professionals, build their businesses, and ultimately, help their clients. FPA Nashville 2006 delivers education, access to resource providers, continuing education credits, and a chance to take a step back from the day-to-day. Attendees will have the opportunity to talk with colleagues, meet with experts in the profession, get practical advice that they can readily apply to their businesses, and take home real solutions that enhance their success! Visit www.FPAAnnualConvention.org for more information.

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 Vice President or the Chapter Office, if you wish to offer your time or input.

Programs VP– Sandy Joel Siff	516-671-1099
Education VP- Joe Fleischman	631-845-5100
Symposium VP– Lou Cino	516-678-5000x6357
Directory VP- Jim Graziano	718-848-7200
Sponsors VP- Tommie Michalik	631-845-5100
Membership VP– Moss Kaufman	631-366-1999
Communication VP- Michael Baras	516-481-0994
Public Seminars VP- Michael Kresh	631-232-9170
Public Relations VP - Jack Chite	631-244-8940
Govt Affairs VP- Marie Rolston	631-289-1876
Ethics VP- Ray Mignone	718-229-2514
Special Events VP - Jim Meyer	631-483-0505
Pro Bono VP - Rich Bergen	631-741-1430
Career Development VP - Maryann Capone	516-752-4178
Fee Advisor Group VP - Andrew Rich	516-433-0828

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.)

THE WOMEN'S FINANCIAL GROUP HALF DAY CONFERENCE

DATE: Friday, September 15, 2006; 8:00 AM to 1:00 PM

LOCATION: Main Maid Inn, Jericho, NY 11753

TWFG invites you to a Half Day Conference that will educate and inspire you to grow your business. The Conference will bring together business women and men for a morning of networking and expert speakers on a variety of business building topics including public relations and marketing, outsourcing, and risk management.

To register please call 631-744-7044 or reply to info@TWFG.org

Membership

Welcome New Members
July - August 2006

Sandra Capek
Mellon
Uniondale, NY

Steven Sheldon Glatt
SAS Consultants
Rockville Centre, NY

Janet L. Liebert
Ameriprise Financial
Smithtown, NY

Frank Melia
First Rate Capital Corp..
Melville, NY

Debra A. Walker
Custom Care Solution LLC
New York, NY

Anniversaries

Congratulations to the following Long Island Chapter FPA members who are celebrating significant FPA anniversaries in July and August.

30 Years			
Joseph H. Clinard, Jr., CFP®	Melville	NY	July 1, 1976
25 Years			
Leo J. Benjamin, CFP®	Hicksville	NY	July 1, 1981
20 Years			
JoAnn Semeraro, CFP®	Massapequa	NY	July 1, 1986
Joan Siegel, CFP®	Bayside	NY	August 1, 1986
10 Years			
Liberatore J. Zagame, CFP®	Lake Grove	NY	July 3, 1996
Knneth R. Cerini, CPA, CFP®	Islandia	NY	July 15, 1996
Roger A. Freedman	East Northport	NY	July 17, 1996
Rhona Liptzin, CPA, CFP®	Mineola	NY	July 17, 1996
Sarah H. Cooper, CFP®	North Babylon	NY	July 24, 1996
5 Years			
Frank P. Marzano, CFP®, CPA	Port Washington	NY	July 10, 2001
Diana T. Stanis, CFP®	Woodbury	NY	July 11, 2001
Pat G. Lanotte, CFP®	Jericho	NY	July 17, 2001

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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 20, 2006	Monthly Program Meeting
♦ October 7-8, 2006	Public Seminar / LI Fall Festival at Huntington
♦ TUESDAY, Oct. 10, 2006	Required CFP® Ethics Course
♦ October 21, 2006	Public Seminar / Senior Expo Suffolk Community College, Brentwood Campus
♦ October 27, 2006	Symposium and Exhibition
♦ TUESDAY, Nov. 14, 2006	Monthly Program Meeting
♦ December 13, 2006	Monthly Program Meeting
♦ FRIDAY, Jan. 5, 2007	Tax Update Seminar; The Woodlands, Woodbury, NY
♦ January 17, 2007	Monthly Program Meeting
♦ February 28, 2007	Monthly Program Meeting
♦ March 21, 2007	Monthly Program Meeting
♦ April 18, 2007	Monthly Program Meeting
♦ FRIDAY, May 4, 2007	Educational Seminar for NYS Insurance CE
♦ May 16, 2007	Monthly Program Meeting
♦ June 20, 2007	Monthly Program Meeting

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

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