

THE PLANNER

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(516) 542-2004, Fax (516) 542-2005
Email: fpali@optonline.net www.fpali.org

"A Gold Level Chapter"

PRESIDENT'S MESSAGE

Since this is my first message to you as President I would like to begin by thanking Ray Mignone for his service to the chapter last year.

When I first started out as your president we had just started to see the effect on the markets that the Subprime mess started to create. As usual once the markets seem to settle in, we are reminded that volatility has not been permanently repealed but is only temporarily in hiding.

The credit crunch created by the fallout from the sub-prime mortgage fiasco set the ground work for the three corrections that we have already experienced since the summer. And it may have been the foreshadowing of a recession to come. It is particularly in times of turmoil when we can provide added value services to our clients with our advice and insight. Times like these are the times that we as planners truly earn our keep. On that note I am proud to be the President of a chapter that has a superior ability to provide our members with great educational opportunities. Joseph Fleischman and Sandy Joel Siff continue to do a wonderful job running our monthly programs. Our Symposium that was held on Friday October 26th was a striking success.

In November I had the pleasure of attending the FPA's National Leadership Conference and you should be proud to know that we have won the Pinnacle Award; of the 105 national chapters only 5 earned this honor this year. As I said at the December Meeting we all owe a great thanks to Janet Cino for the work behind the scenes that made it possible.

Recently I had the pleasure to sit in on a planning session for our study group program that will provide special educational opportunities on focused topics. This program, chaired by Craig Marcott with the assistance of Tony Papa and Diane Wilkie, is laying the ground work for our members to roll up their sleeves and get into the details of advanced planning topics. Education will continue to be a prime focus for our chapter. We are also expanding our outreach to our communities. I am pleased to let you know that your board has agreed to be a sponsoring member for the Financial Literacy Coalition, a not for profit group, whose goal is to teach basic finance to high school students. For 2007 they have enrolled 15,447 students in 109 schools in the New York Metropolitan area. We are actively working with Andrew Brezak, the Long Island coordinator, and our goal is to help increase the number of participating Long Island schools and educate teachers in basic finance.

Although the markets are starting 2008 in turmoil we will still strive as a chapter to give you the tools to guide your clients and I feel that 2008 will be a great year for our chapter and our profession.

Michael Kresh, CFP®
President



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2007-2008

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FPA
FINANCIAL PLANNING ASSOCIATION
OF LONG ISLAND

The Heart of Financial Planning™

What's Happening —

Announcements from the Editor

- > Our next program meeting will be held on **Wednesday, February 27th** from 5:30 to 8:30 PM at the Crest Hollow Country Club.
- > **Save The Date:** The CFP® Required Ethics Course will be given on **Wednesday, October 1st, 2008**, 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 31, 2008** at the Crest Hollow Country Club, Woodbury, NY.
- > Nominate a colleague or yourself for the prestigious **Howard Black Award!** Nominations must be submitted by **August 31, 2008**. For more information and/or a nomination form contact the chapter office at 516-542-2004 or email fpali@optonline.net.
- > 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 2007-2008

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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.



SPOTLIGHT ON FPA LI MEMBER

Submitted by Frank Giangrande

Michael D. Kresh, CFP®



Michael D. Kresh is President and Chief Investment Officer of M.D. Kresh Financial Services, Inc. He obtained his Bachelor of Science degree from the State University of New York and has earned his Chartered Life Underwriter and Certified Financial Planner designations.

Michael sits on the Editorial Review Board of the Journal of Financial Planning and was chosen to be a guest speaker at the 2003 Society of Financial Services Professionals National Conference. From 2001 through this year **Wealth Manager Magazine** named him to their list of Top Wealth Managers according to such criteria as average individual account size and overall growth in assets under management. In addition, qualifying firms have to be independently owned and operated, offering comprehensive planning services in house.

In 1999 he received the prestigious **Dalbar Financial Professional Seal**, awarded to an elite group of planners who placed highest in client trust, service, and investment performance according to Dalbar's extensive national research. For 2006 and 2007 the **Consumers' Research Council of America** named Michael as one of America's Best Financial Planners.

Nationally known in the area of retirement and investment planning services, Michael Kresh has been a regular guest on CNBC's Power Lunch from 1998 through 2005 and has been frequently quoted in *The Wall Street Journal*, *The New York Times*, *Newsday*, *The Daily News*, *Mutual Funds* magazine, *Business Week*, *Worth*, *Kiplinger's* magazine and *Fortune*. In addition to CNBC's Power Lunch, he has appeared on MSNBC, Bloomberg TV, NBC's Nightly News Weekend Edition and The CBS evening news and the Today Show.

CHANGE IN CHAPTER POLICY

Due to the large number of walk-in registrations at program meetings a change has been made to our chapter's policy. There will now be a surcharge of \$15 added to the fee charged to attend program meetings to those who have not registered 24 hours prior to the meeting. This change will be effective with our September 2007 program meeting.

Registrations can be made by mailing in the form with your payment; sending an email to fpali@optonline.net; faxing the form to 516-542-2005; or by calling 516-542-2004.

In the event that you have registered for a meeting but cannot attend, cancellations made 24 hours prior to the meeting will be given a credit that can be used at any future chapter event.

Your co-operation will be greatly appreciated and will help us be better prepared (handouts and seating).

RESOLVED TO BE INVOLVED

Since the Financial Planning Association was founded, promoting our members interests has been a key part of our mission. Our mission statement on the home page of our chapter website (www.fpali.org) or on page 4 of our Annual Journal & Directory outlines our purpose as an organization.

The Financial Planning Association strives to achieve the following objectives:

- Unify the voice, focus and resources of the financial planning community.
- Grow the organization by bringing together those who champion the financial planning process.
- Cultivate the body of knowledge of personal financial planning.
- Advance brand awareness for professional financial planners, building the CFP® certification as the hallmark of the brand.
- Define and effectively communicate a common understanding of the discipline of personal financial planning and benefits of its use.
- Facilitate the success of our members.

In order to continue to serve our membership it is absolutely vital that we involve more individual members in this process. Our organization must have the ability to achieve these objectives through individual involvement.

If you would like to contribute please contact the Chairperson, or any one of the members on the committees listed below and volunteer your service and expertise.

The Financial Planning Association of Long Island would like to thank you in advance for your involvement.

Frank Giangrande
Director of Communications

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 feel 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 and Scott Sanders	631-366-1999 516-938-5219
Communications - Frank Giangrande	516-889-7188
Public Awareness - Jack Chite	631-244-8940
Public Relations - Michael Baras	516-481-0994
Government Affairs - Anthony Papa	516-536-4436
Ethics - Ray Mignone	718-229-2514
Pro Bono - Rich Bergen	516-741-1430
Career Development - Maryann Capone	516-752-4178
Fee Advisor Group - Andrew Rich	516-433-0828
Focus Groups - Craig Marcott	631-286-1061



FPA Long Island Public Awareness Activities

This past October volunteers from our chapter actively spread the word on the importance of financial planning and the Financial Planning Association. On Saturday and Sunday, October 6th and 7th, we joined the crowds at the 2007 Long Island Fall Festival at Heckscher Park in Huntington. The days were bright and sunny and many people stopped by to speak with our volunteers. Special thanks to Lisa Wong, Mike Baras, Joe Fleischman, Elke Mariotte and Bob Kennedy for helping to make Financial Planning Week a success.

FPA is excited to celebrate its seventh annual Financial Planning Week™, October 6 through 12, 2008! Financial Planning Week brings together those who provide, support and benefit from professional financial planning. During this special week, FPA strives to increase public awareness of the financial planning process to help people make prudent financial decisions to achieve their goals and dreams. Anyone wishing to be involved in the Long Island Chapter's public awareness events or if you have ideas and suggestions you would like to share with the committee, please contact our chapter's Director of Public Awareness, Jack Chite (631-244-8940) or the chapter office (516-542-2004 or fpali@optonline.net).



FPA of Long Island Receives Pinnacle Award at 2007 Chapter Leaders Conference

The Financial Planning Association® (FPA®) of Long Island was recognized at FPA's 2007 Chapter Leaders Conference for attaining the Pinnacle Award, the highest level of achievement in FPA's Chapter Recognition Program. The Pinnacle Award is reserved for chapters who have received gold level achievement five consecutive years. The chapter was honored for its accomplishments and efforts in chapter operations, chapter leadership, community outreach, member outreach, membership development and special achievements.

"It's an honor to be recognized for our achievements," said Michael Kresh, president of FPA of Long Island. "We've worked diligently over the past year to increase our success and are proud that our efforts have been recognized on a national level."

FPA President Nicholas A. Nicolette, CFP®, and Chapter Recognition Program Task Force Chair Andrew Keeler, CFP®, presented the award. Michael Kresh, Chapter President, accepted the award on behalf of the FPA of Long Island.

VOLUNTEERS WANTED

FPA Career Development Committee
FPA Journal/Directory Committee

The FPA Career Development Committee and the FPA Journal/Directory Committee are both in need of one (1) volunteer for each committee to help with their respective committees. Both committees are very important for the functioning of our organization and anyone interested in serving please contact MaryAnn Capone at 516-752-4178; email at mcapone7@optonline.net for the Career Development Committee and Jim Graziano at 631-656-8884 email jgraz@optonline.net for the Journal/Directory Committee, or please leave your name with Janet Cino at the Chapter Office (516-542-2004; email fpali@optonline.net)

Frank G. Giangrande CFP

Volunteers Wanted FPA Long Island Public Relations

The FPA Public Relations/Public Seminar committee is looking for knowledgeable articulate CFP® volunteers to help promote the cause of Financial Planning to the public. Our media response team has had some success in educating the news media and informing the press about the importance of Financial Planning. Our members have recently been quoted in *Registered Rep*, *Investment News*, *MS-NBC*, *NBC's Today show*, *Stars and Stripes*, *Newsday*, *the New York Times* and the *Wall Street Journal*, among others.

If you are interested in joining this elite group please contact **Michael Baras (516) 481-0994**, (fpalongisland@gmail.com) or leave your name with Janet in the chapter office.

Michael Baras
Director Public Relations

Welcome New Members October 2007 - January 2008

Douglas Celiberti, CFP®
SCWA
Wantagh, NY

George Ghiozzi
South Ozone Park, NY

Roy S. Gilbert
Lincoln Financial Advisors
Syosset, NY

Melissa Grapone
American Portfolios
Financial Services, Holbrook, NY

Chester H. Greenspan, Esq., CFP®
TaxLand, Inc.
Jericho, NY

Cristina Guglielmetti
Van Cleef, Jordan & Wood, Inc.
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Steven Kaczmarek
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Matthew R. Newman
Blackstone Mortgage Co
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Susan E. O'Connor
Merrill Lynch
Port Washington, NY

Morgan J. Weil, CFP®
Ameriprise Financial, Inc.
Sound Beach, NY

Thierry E. Zurek
Sagemark, Woodbury, NY

Anniversaries

Congratulations to the following Long Island Chapter FPA members who are celebrating significant FPA anniversaries in 2007—January 2008.

25 Years

Lisa H. Keaton, CFP®	Smithtown	NY	August 1, 1982
Howard Ross, CFP®, Esq., ChFC	Syosset	NY	November 15, 1982
Jon L. Ten Haagen, CFP®	Huntington	NY	January 1, 1983

20 Years

Ilean Barkoff, CFP®	Woodbury	NY	October 1, 1987
David Horowitz, CFP®	Plainview	NY	October 1, 1987
Diane E. Wilkie, Esq., CFP®	Hempstead	NY	February 1, 1988

15 Years

Michael Hartzman, CFP®	Plainview	NY	December 1, 1992
Lonnie M. Garber, CFP®	Garden City	NY	December 17, 1992
Marilyn C. Stefans, CFP®, EA	Woodbury	NY	December 21, 1992
Jay Freeberg, CPA, CFP®	Garden City	NY	January 18, 1993
Raymond N. Bergen, CFP®	Forest Hills	NY	February 18, 1993

10 Years

Merri P. Ciano, CFP®	Brightwaters	NY	December 16, 1997
Thomas M. Rooney, CFP®	Williston Park	NY	January 17, 1998
Mark L. Vaimberg, CFP®	Hauppauge	NY	February 5, 1998
Donna A. Roitstein, CFP®	Sag Harbor	NY	February 6, 1998
John S. Wamboldt, CFP®	Rockville Centre	NY	February 23, 1998
Robert J. Kennedy, CFP®	Massapequa Park	NY	February 26, 1998

5 Years

Serge R. Pinard, CFP®	Uniondale	NY	December 12, 2002
Paul Lentini	Huntington	NY	January 10, 2003
William D. Murphy	Rockville Centre	NY	January 21, 2003
Mitchell O. Goldberg	Dix Hills	NY	February 27, 2003
Gary A. Egge, CPA, CFP®	Williston Park	NY	February 28, 2003

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*A Special "Thank You"
to the Sponsors & Exhibitors who
generously contributed to Symposium 2007*

Platinum Level

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Gold Level

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Silver Level

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Association of Divorce Financial Planners
AXA Equitable
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Center for Wealth Preservation
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ICON Advisers
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Select Life Settlement Corporation
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Wells Real Estate Funds
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Thank You to the Symposium Committee!

Michael Baras	Louis J. Cino	Thomasina Michalik
Herbert Barnes	Joseph W. Fleischman	Raymond D. Mignone
Richard L. Bergen	Frank Giangrande	Andrew M. Rich
Alan M. Borko	James Graziano	Sandy Joel Siff
Maryann Capone	Moss Kaufman	Jon Ten Haagen
Jack Chite	Michael D. Kresh	Diane E. Wilkie
	Craig Marcott	

Congratulations to Sy Buckner

Winner of the Luncheon Raffle
A free Week-end Stay for Two at a Marriott Hotel, Resort or Suite

The Eighth Annual
SYMPOSIUM & EXHIBITION
Great Job Again!

Symposium 2007, which was held on October 26, 2007 at the Crest Hollow Country Club, was well attended. The attendee evaluations were overwhelming positive, every single attendee that completed an evaluation either agreed or strongly agreed that they were satisfied with their experience and what's more, that they would recommend next year's Symposium to people they knew. They also gave high praises to our Pre-Conference session speaker Bob Katz, Concurrent Session speakers Vincent Russo, Bob Vandy and the Luncheon speaker Ross Levin. The attendees also gave high marks to the Symposium Committee for a well run event and to the Crest Hollow Country Club.

The goals of the Symposium Committee were to provide the attendees with a diverse offering of topics, presented by top-notch speakers, in a comfortable and collegial environment. I believe all of the people who attended Symposium would agree that not only did our committee meet those goals, it exceeded them. I would like to thank all the members of the Symposium Committee for all the hard work they put in to make the Symposium a success. I would especially like to thank Tommie Michalik who was responsible for signing up all of our sponsors and exhibitors. The exhibit hall was sold out again and a special thanks goes to all our exhibitors for helping to support our chapter year after year without fail! We were especially pleased to have a visit from Nick Nicolette, CFP®, Chairman of the Board of Directors, FPA National. Nick addressed the attendees at lunch and gave an update as to what is happening on a national level and the value of being a member of the organization.

Lastly, I would like to thank our members for attending the Symposium and for the positive feedback and support our committee and Board always receives from you. An organization like the FPA is built upon its membership, and we have great members.

The Symposium Committee has already begun planning this year's program. **Symposium 2008** is scheduled to be held on Friday, **October 31, 2008**, at the Crest Hollow Country Club. Mark your calendars today and watch for early registration incentives!

Anyone interested in joining the committee or sharing ideas for topics or speakers that they would like to see at the next event should contact me at 516-678-5000 or lcino@molloy.edu. Please come and join us!

Lou Cino
 Symposium Chairperson 2008

The Financial Planning Association
 of Long Island
 is both pleased and proud to announce that

MARIE ROLSTON, CFP®

has been honored posthumously
 as the 2007 recipient of the

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



The Howard Black Award is given in memory of Howard Black, who passed away in 1992. Howard was an attorney widely recognized in the financial planning industry for his depth of knowledge and ability to impart information to friends and colleagues in a manner that was both informative and easy to understand. The award is given by the Past Presidents Council and it recognizes an individual in the financial planning field who not only

shares the vision Howard had about the profession, but who also demonstrates a compassion for the community.

The award was presented posthumously to Marie Rolston, CFP® on October 26, 2007, during the annual symposium. Marie's daughter Jennifer and son, Michael were there to receive the award for their mother. Marie's long time friend Christine Werner shared with us a tribute to Marie and some of the wonderful accomplishments Marie achieved as a teacher, financial planner, a single mom, a true and dear friend in her short life.

The Past President's Council and all the members of the Board of Directors with great honor bestow this Award posthumously to Marie Rolston and thank her for touching all of our lives.



PAST RECIPIENTS

- 1994 Leo J. Benjamin, CFP
- 1995 Joseph H. Clinard, Jr. CFP
- 1996 Jon L. Ten Haagen, CFP
- 1998 Eve Schniebolck, CFP and Richard L. Bergen, CPA, CFP
- 1999 Thomasina Michalik, CFP and Andrew M. Rich, CFP
- 2000 Jill M. Peetluk Feinstein, CFP
- 2001 James E. Meyer
- 2002 Diane E. Wilkie, Esq., CFP
- 2003 Kathleen Keegan, CFP
- 2004 Louis J. Cino
- 2005 Jack Chite, CFP
- 2006 Craig Marcott

**THANK YOU
 to all of our
 FANTASTIC SPEAKERS!**

- Robert Katz • Brian Levitt • Vincent J. Russo
- Lorraine Lods • Lee W. Schultheis
- Robert L. Goldfarb • Bob Vandy • Mark Goldberg
- Jack Chite • Rich Bergen • Frank Giangrande
- Nicholas Nicolette • Ross Levin
- Jonathan M. Heller • Steven I. Alin
- Doug Gratz • Chris Lynn • Morris Glazer

15 Traits of Successful Entrepreneurs

By Marc Kramer

These characteristics can propel you toward your goals.

During the last 20 years, I have been fortunate enough to meet, interview, and work with some of the best entrepreneurs of the 20th and 21st centuries, such as Steve Jobs of Apple; Warren "Pete" Musser, founder and former chairman and CEO of Safeguard Scientifics, which funded Novell, QVC, and Comcast; Dr. Hubert Schoemaker, who built and sold Centocor to Johnson & Johnson; Scott McNealy, chairman and founder of Sun Microsystems; Betsy Cohen, who founded and built four public companies; Holocaust survivor Dr. Felix Zandman, founder and chairman of multibillion-dollar electronics company Vishay Intertechnology; and many others.

As a faculty member at the Wharton School of Business, I am often asked by students what it takes to be a successful entrepreneur. Here are the common traits I have noticed among all of these entrepreneurs.

Habit of reading. Every single successful entrepreneur I have met has been a voracious learner. They read biographies of other famous people and devour books on strategy, product development, and trends. They read newspapers and websites, though rarely magazines. When I worked with Hubert Schoemaker, he would encourage me to take a day a week to just read and think about things.

Young start. They typically all sold products and services as teenagers. They loved to work and make money. If they were from the U.S., they had newspaper routes and lemonade stands and sold other items.

Driven. They always wanted to be good at something. Not all of them were academic stars, but they wanted to succeed.

Unique vision. They see things differently than everyone else. They have a gut instinct about trends and opportunities that have been honed through experience, observation, and reading. They turn problems inside out and figure out how to simplify things.

Love of travel. They enjoy seeing and learning about other cultures. They aren't so arrogant as to think that Western culture is the most intelligent. Some of them, like Steve Jobs, integrate some of what they learn from other cultures into their corporate cultures.

Intellectual curiosity. All of them are interested in learning about other businesses, listening to other people's stories, and questioning why things are a certain way. Betsy Cohen told me she lived for the intellectual challenge of developing and starting a new business.

Don't suffer fools. Successful entrepreneurs surround themselves with smart people who question their ideas and assumptions. They hate "yes people" and appreciate confident people who push back.

Good listeners. A lot of people like to hear the sound of their own voice, but successful people are good listeners. I have seen Pete Musser sit for prolonged periods without saying a word. Bill Gates is known for rocking back and forth in meetings, absorbing the words of his guest like a sponge.

Marathon workers. There is no such thing as a 40-hour work week. In fact, a 60-hour week would be considered a vacation. These people love to work. Unfortunately, the balance between family life and work doesn't exist.

"No" is not in their vocabulary. The only "no" these people remember is when their parents told them not to run in the street. Barriers are just challenges.

Big thinkers. All of these people thought about how they might have an impact on their industry, region, and country. Their idea of success wasn't building a couple of million-dollar businesses, but businesses that brought in hundreds of millions, if not billions, of dollars.

Competitive spirit. They love competition. Typically these people liked to compete either athletically or through the arts. The tougher the competition, the more pumped up they become. I remember hosting Scott McNealy at a dinner and the conversation naturally got around to Bill Gates. McNealy's eyes lit up as he talked about plans to take on the software emperor in the software server space.

Fearless. These people don't worry or shy away from adversity. They believe in the adage "what doesn't kill us makes us stronger." When I worked for Schoemaker, I watched his company's share price go from \$122 to \$5 a share, and industry publications were writing his business obituary. At least on the surface, Hubert was as cool as if his stock price were at record highs.

Fighting spirit. By all rights, Felix Zandman, a Holocaust survivor who had to live under the floorboards for more than a year and watched his family carted off to concentration camps, could have died mentally along with most of his family. His will to overcome adversity allowed him to start a family and build a global empire.

Risk-averse. "Wait a minute," you're probably thinking. "Doesn't he mean 'risk-takers'?" You read correctly. These people focused on the opportunity, researched the market, spoke to customers and market experts, and developed a variety of financial models to determine the chances of their ventures' success.

I would have to say from my own observations that these people are self-absorbed, but in a positive way. Many people worry about others, situations, and other things that distract them from their ultimate goal. Successful people are non-complainers who are focused on goals, and money is a byproduct to be used to create more success.

Marc Kramer is the author of five business books on topics related to venture capital, management, and consulting. He is a faculty member at the Wharton School of Business at the University of Pennsylvania and the veteran of over 20 start-ups and four turnarounds.

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Are you a licensed professional with a **solid background** in the financial services industry? Do you have a strong desire to take your business to the next level? If so, then here is an opportunity for you to maintain your current book of business while developing relationships within an existing practice of fee-based clients.

With over 20 yrs of experience, this local Fee-Based wealth consultant has built a successful practice. Partnered with one of the largest independent broker dealer groups in the country, we are able to serve our clients' needs through Retirement, Estate & Legacy Planning. This is an opportunity for the right person to develop a relationship as a "Trusted Advisor" for the existing clients of the firm while expanding their current client base.

The ideal candidate will have a bachelor's degree, S 7, 66 & a proven track record of commission sales. A minimum of 3 years in the financial services industry with a clean credit, criminal & compliance background is required. This is not a salaried position but rather an opportunity to finally earn what you are worth & build a business with a future.

If not yourself then perhaps you know someone that could benefit with this opportunity?

For more information, contact
Pam at 631-777-7505.

Help Wanted

The Program Committee of the FPA of Long Island will be meeting to continue the planning of the program meetings for September 2008 through June 2009.

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

All chapter 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

Volunteers Needed to host Round Tables

Anyone interested in hosting a discussion at a Round Table prior to our monthly program meetings should contact Art Dolega (718-205-2880 or email 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.

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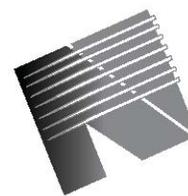
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Seeking Employment

I am seeking employment with a financial planning / investment management firm in the New York metro area. I am a Certified Public Accountant and a Certified Financial Planner. I am currently preparing for the CFA Level 1 examination. I have all pertinent NASD licenses and NY life/health insurance licenses. I have experience in portfolio management, tax preparation, tax research, resolving client issues, brokerage operations, making presentations to retirement plan participants, writing articles for the company website. Resume is available upon request.

I can be reached at
damazz008@yahoo.com or **516 526 7494**.

The Women's Financial Group ***Upcoming Event*** ***Wednesday March 12, 2008 at 6 PM***

"A New You in the New Year"
Dr. Christy Russell-Shae
Founder, Simply Vibrant

The Main Maid Inn, Jericho
Light dinner will be served

\$20 - Charter Member; \$25 - Regular Member; \$40 - Non-Member

To reserve your seat please call 631-744-7044
or register online at www.TWFG.org

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

- ◆ February 27, 2008 Monthly Program Meeting—Best Practices in Variable Annuity Sales and a Discussion of Rule 2821
- ◆ March 19, 2008 Monthly Program Meeting — The Changing Nature of Personal Risk
- ◆ April 16, 2008 Monthly Program Meeting—Premium Financed Life Insurance: Real or Scam?
- ◆ May 3, 2008 Public Awareness Event / 50 Plus Lifestyles & Senior Celebration Expo
- ◆ Friday, May 9, 2008 Educational Seminar: Carlyle on the Green, Farmingdale, NY
- ◆ May 21, 2008 Monthly Program Meeting — Using Trusts in Estate and Retirement Planning
- ◆ June 16, 2008 Annual Scott Hirschbein Memorial Golf Outing, Hamlet Wind Watch, Hauppauge
- ◆ June 18, 2008 Monthly Program Meeting— Common Planning Strategies Post DRA
- ◆ October 1, 2008 Required CFP® Ethics Course
- ◆ October 31, 2008 9th 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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