THE PLANNER

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

"A Gold Level Chapter"

PRESIDENT'S MESSAGE

Dear Fellow FPA Member:

Greetings and Happy Summer! Our chapter doesn't have any program meetings during July and August but your board of directors will be holding a half-day strategy meeting during the summer.

New President – As of July 1st Michael Kresh will be the FPA of Long Island chapter president since I have completed serving my term. I will become Chairman of the Board as well as Director of the Ethics Committee. I'm confident Michael will do a great job as president and continue some of the initiatives that we began over the last year. I wish Michael the best.

New Board Members - I want to welcome our two new board members Tony Papa and Jack Chite. The reason our chapter has such great programs and activities is because we are fortunate to have dedicated, experienced board members who take the time out of there own busy practices to give back to our profession. If you have ideas or would like to get involved on a committee please contact Janet Cino.

Thanks For Your Support – My term as president has gone by very quickly and has been an education for me on how to get things done in a volunteer organization. Two of the major initiatives we accomplished over the past year were hiring a public relations firm for the chapter and streamlining the current board of directors.

As with any organization it is uncomfortable for certain individuals to accept change, but I believe in order to move forward we need to continuously review and explore new ideas and make changes which will improve the chapter. Our chapter is fortunate that we have had some great-dedicated leaders in the past and I believe we currently have an energetic team in place that will continue to improve our chapter for you and promote our profession to the public.

Best Regards,
Raymond D. Mignone, CFP®

Board of Directors

2007-2008

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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, September 19th** 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 3rd, 2007**, 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 26, 2007** 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, 2007**. For more information and/or a nomination form see page 9 or 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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212-314-4899; Lorraine.Lods@AXADistributors.com

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516-745-8484; dsawucju@chubb.com

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917-837-6856; kaler.rj@dreyfus.com

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800-537-1004x48433; anthony.camilleri@db.com

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516-376-4377; Richard.Groom@janus.com

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800-262-1626; lcarr2@massmutual.com

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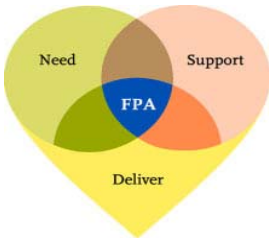
516-593-5626x223; sglattsas@optonline.net

Vertical Lend—Meaghan Frail
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.



SPOTLIGHT ON FPA LI MEMBER

Submitted by Frank Giangrande

Arthur Dolega, CFP®

Arthur Dolega is the president of Vision Financial Services and a Registered Principal with Next Financial Group, Inc. He has received the Certified Financial Planner® designation in 2003 from the American College.

Arthur's career in financial services started in 1998 through an affiliation with the Park Avenue office of First Investors Corporation in New York City. Six years later by embracing a buy-out opportunity he started Vision Financial Services with an independent broker/dealer.

Arthur was recently selected as one of "America's Top Financial Planners" by Consumers' Research Council of America, a non-for-profit research organization. The criteria used in their study included education, specialty training and continuing education as well as experience and financial designations.

Belonging to a financial community is what keeps advisors at the cutting edge in the industry. Arthur is a program committee member of the Financial Planning Association's (FPA) Long Island Chapter. Program committee's responsibility is organizing continuing education meetings for the members and professionals holding the CFP® designation. In addition, Arthur also oversees the planning of the Roundtable Discussions at the beginning of all program meetings. Roundtables add value to our members in that the specialists in particular planning topics make themselves available for questions and discussions before the regular presentation at the monthly meetings. Anyone interested in leading a Roundtable should contact Arthur at 718-205-2880.

Arthur is a devoted family man and trusted member of the community. He is active in the local Juniper Park Civic Association. The association's task is improving quality of life in the community from working on zoning laws in the neighborhood to preserving historic landmarks. Arthur writes regular column on financial matters in the local "Juniper Berry". He's also written in special sections of Times Ledger newspaper with a Queens-wide circulation.

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).

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!

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.

We plan on hosting a media training session / roundtable for those interested parties with Shari Goldstein, the chapter's professional public relations liaison.

Michael Baras
Director Public Relations

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
October 1—7, 2007

The FPA annually celebrates Financial Planning Week each Fall to promote the concepts of financial planning. On Saturday and Sunday, **October 6-7, 2007**, our chapter will be hosting a booth to inform the public of Financial Planning issues at the Huntington Chamber of Commerce Fall Festival. This is the largest fall festival attracting upwards of 200,000 people. We believe this is a great opportunity during Financial Planning Week to help the public discover the value of financial planning and advance the financial planning profession.

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 send your availability to the chapter office (by email to fpali@optonline.net or fax to 516-542-2005).

Volunteer's Name: _____

Phone #: _____

Email: _____

Days Available: Saturday, Oct. 6 _____

Sunday, Oct. 7 _____

Times Available:

10 AM _____ 1 PM _____

11 AM _____ 2 PM _____

12 PM _____ 3 PM _____

Anytime _____

Committee Chair:
Jack Chite 631-244-8940

The Scott Hirschbein Memorial Golf Outing

Held Monday, June 18, 2007

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

The Annual Scott Hirschbein Memorial Golf Outing was held on June 18th at the Hamlet Wind Watch Golf Course. It was a beautiful day and a fun time was had by all.

The award winners were as follows:
Low Gross Men - Anthony Camilleri
Low Gross Women - Madge Chase
Low Team Gross - Anthony Camilleri, Dan Rossiter, Scott Frayler and Eddie Oborman
Low Team Yellow Ball– Robert Zerah, Ryan Ren, Bernadette Hoban and Sebastian Triscari
High Gross Men and Women (or Most Honest Golfer)- Peter Alcarese and Joanne Ganz
Closest to the Pin Men - Dan Rossiter
Closest to the Pin Women - Linda Katz
Closest to the Center Men - John Diami
Closest to the Center Women - Terri Williams
Long Drive Men - Dennis O'Sullivan
Long Drive Women - Bernadette Hoban

Dave Pappas, Pete Molloy, David Horowitz, Carl Nappi and Bruce Berman competed in the putting contest, but no one took the prize. There were no winners in any of the hole-in-one contests either.

Many thanks to all of our Tee Sponsors and special thanks to:
Breakfast Sponsor - Steve Burke with Jackson National
Lunch Sponsor - Wendy Ehrlich with Oppenheimer Funds
Awards Sponsor-Andrew Magnus with Schwab Institutional
Contest Sponsor-Ryan Ren with Wasatch Funds

Tee Sponsors
AIM Investments, American Skandia,
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DWS Scudder Investments, Janus Intech,
MainStay Funds, MFS Fund Distributors, Inc.,
Nationwide / The Best of America,
and Penn Mutual Variable Annuities

We cannot thank our sponsors enough, their support helps us to run these great events. Please thank them when you see them at meetings for their support.

Robert Katz | Dr. Jerry A. Webman | Vincent Russo

SYMPOSIUM & EXHIBTION 2007

October 26, 2007 — 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: **Dr. Jerry A. Webman; Chief Economist, OppenheimerFunds, Inc.**
10:30—11:00 AM	**Exhibit Hall Open—Break with Exhibitors**
11:00—11:50 AM	**Concurrent Session I** ►*Case Studies on Elder Care Planning* (1 CFP* and/or CPA CE credit) Speaker: Vincent Russo, Esq.; Vincent J. Russo & Associates, P.C. ►*Comparison of Variable Annuities* (1 CFP* and/or CPA CE credit and/or 1 NYS Ins. Credit) Speaker: Lorraine Lods, Regional Vice President, AXA Distributors ►*Absolute Return Strategies & Alternative Mutual Funds* (1 CFP* and/or CPA CE credit) Speaker: Lee W. Schultheis, Chief Investment Strategist, AIP Mutual Funds ►Practice Management and Student Track— *"Professional Education and Designation Preparation"* (No CE Credit) Panel of Speakers; Moderator: Maryann Capone
11:50 –12:10 PM	**Exhibit Hall Open—Break with Exhibitors (first Raffle)**
12:10—1:00 PM	**Concurrent Session II** ►*Gifting and Estate Taxes* (1 CFP* and/or CPA CE credit) Speaker: Robert L. Goldfarb, CPA; Partner, Schoenfeld Mendelsohn Goldfarb, LLP ►*The New Landscape of Long-Term Care Planning* (1 CFP* and/or CPA CE credit) Speaker: Bob Vandy; National Long-Term Care Brokers ►Practice Management Track— (No CE Credit) *Succession Planning for Planners: Buying or Selling a Financial Planning Practice"* Speaker: Mark Goldberg; Former chairman of Royal Alliance Associates and Current President of Private Wealth Management ►Practice Management and Student Track—(No CE Credit) *Tools and Techniques for Building a Successful Financial Planning Practice and Career* Panel of Speakers; Moderator: Jack Chite, CFP
1:00—2:30 PM	Lunch (1 CFP* and/or CPA CE credit) Luncheon Speaker: **Ross Levin, CFP; Founding Principal of Accredited Investors, Inc.**
2:30—2:50 PM	**Exhibit Hall Open—Raffle**
2:50—3:40 PM	**Concurrent Session III** ►*Making the Most of Your Portfolio to Meet Retirement Distributions* (1 CFP* and/or CPA CE credit) Speaker: Ron Albahary, CFA, Managing Director, Client Portfolio Management Team, SEI Advisor Network ►*Pensions for Small Business: A Case Study* (1 CFP* and/or CPA CE credit) Speaker: Steven I. Alin; President, Pension Design Services, Inc. ►*Fundamental Indexing: Benchmarks of Choice for Today's Markets* (1 CFP* and/or CPA CE credit) Speaker: Doug Grantz, Vice President, PowerShares Capital Management, LLC
3:40—3:50 PM	Afternoon Break
3:50—5:30 PM	**Post Conference Sessions** ►*Dispelling the Myths: New Truths for Today's Income Investor* (1 CFP* and/or CPA CE credit and/or 1 NYS Ins. Credit) Speaker: Chris Lynn, John Hancock Wood Logan ►*Retirement Plans that Maximize Benefits* NYCL 207137(1 CFP* and/or CPA CE credit and/or 1 NYS Ins. Credit) Speaker: Morris Glazer; Regional VP, Transamerica Retirement Services

*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.

Lorraine Lods Ross Levin Robert L. Goldfarb

SYMPOSIUM & EXHIBTION 2007

October 26, 2007 — 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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- -

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 26, 2007, Crest Hollow Country Club, Woodbury, NY

How do they do it? Once again the Symposium Committee of the FPA of Long Island has put together topics and speakers for what will be the best ever Financial Planning Symposium and Exhibition! It will take place on Friday, October 26, 2007, at the Crest Hollow Country Club in Woodbury. All of our speakers and topics are already lined up for the day. Nationally known speakers **Dr. Jerry Webman**, Chief Economist from OppenheimerFunds and **Ross Levin, CFP**, founding Principal of Accredited investors, 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 present Case Studies on Elder Care Planning, Lorraine Lods will cover a Comparison of Variable Annuities and Robert Goldfarb will be speaking on Gifting and Estate Taxes. 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 August.

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 3 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 26th!

Louis J. Cino
Director of Symposium 2007

Symposium 2007:
October 26, 2007 - Crest Hollow Country Club, Woodbury, NY

Name: _____

Company: _____

Address: _____

City: _____ Zip: _____

Badge Name: _____ Phone: _____

Email: _____ Fax: _____

CFP License #: _____ NYS License #: _____

Rates:	5/12/07-10/12/07	10/13/07-10/26/07
Member	$150.00	$200.00
Non-Member	$220.00	$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 12, 2007. Refunds will not be granted after October 12, 2007, however substitutions can be made at any time at no charge.

Membership

Welcome New Members
May - June 2007

Raymond Alvarez
Granite Securities, LLC
Sayville, NY

Norman G. Carter, CFP®
MetLife Financial Services
Melville, NY

Emanuel J. DeFreitas, CFP®
Pasternostro & DeFreitas, LLP
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Financial Planning Group
Mineola, NY

Patrick J. Sullivan
Law Offices of Patrick J. Sullivan
Mineola, NY

Dan M. Wahba
DMW Financial
Shoreham, NY

Anniversaries

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

25 Years

Lee Rosenberg, CFP®	Jericho	NY	June 1, 1982

20 Years

David H. Smalbach, CFP®	Rockville Centre	NY	May 12, 1987
Frank J. Todaro, CFP®, CLU	Mineola	NY	June 1, 1987
Joan M. Huber	Brookville	NY	June 2, 1987

15 Years

Henry R. Pupke, CFP®	New York	NY	May 5, 1992
Mayur T. Dalal	Lake Success	NY	June 1, 1992
Vaughn H. Weimer, CFP®	New York	NY	June 23, 1992
Anthony F. Papa, CFP®	Rockville Centre	NY	June 25, 1992

10 Years

Theresa A. Chamberlin, CFP®	Islandia	NY	May 30, 1997
Mark Furman	Uniondale	NY	June 4, 1997
Vincent J. Famulari, CFP®	North Bellmore	NY	June 24, 1997
Mark S. Klebanoff, CFP®	Wantagh	NY	June 27, 1997

5 Years

Jerry L. Style, CFP®, ChFC, EA	Bohemia	NY	May 23, 2002
Douglas K. Flynn, CFP®, ChFC	Garden City	NY	May 28, 2002
George P. Bellucci	Massapequa	NY	May 30, 2002
Dennis Haber, Esq.	Hicksville	NY	June 11, 2002
Kevin J. Cantwell, CFP®	Coram	NY	June 12, 2002
Thomas Laundrie, CFP®	Garden City	NY	June 21, 2002

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.

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(631) 845-5100 ext. 301 today!
TMichalik@VanderbiltSecurities.com

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Corporate Headquarters
445 Broad Hollow Road, Suite 400
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www.VanderbiltSecurities.com

Securities offered through Vanderbilt Securities, LLC. Member: NASD/SIPC. Clearing Agent: Bear Stearns Securities Corp.

Help Wanted

The Program Committee of the FPA of Long Island will be meeting in July to continue the planning of 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 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

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Please contact **Jeffrey Bettan** at **516-642-6636** and we can talk it over.

Flexible Mortgage Funding, Inc.
333 Jericho Turnpike, Jericho, N.Y. -- 516-942-1222
Registered NYS Mortgage Broker - loans arranged through 3rd party lenders.

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
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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

♦ September 19, 2007	Monthly Program Meeting — Education Planning and FAFSA Preparation
♦ October 3, 2007	Required CFP® Ethics Course
♦ October 6-7, 2007	Public Awareness Event / LI Fall Festival at Huntington
♦ **October 26, 2007**	**8th Annual Symposium and Exhibition**
♦ TUESDAY, November 13, 2007	Monthly Program Meeting — Tax and Financial Planning Program
♦ December 12, 2007	Monthly Program Meeting— Advanced Uses of Insurance in Estate Planning and Business Situations
♦ FRIDAY, January 4, 2008	Tax Update Seminar; The Woodlands, Woodbury, NY
♦ January 16, 2008	Monthly Program Meeting — Asset Allocation—Panel of Managers
♦ February 27, 2008	Monthly Program Meeting—
♦ March 19, 2008	Monthly Program Meeting — Property and Casualty Insurance
♦ April 16, 2008	Monthly Program Meeting—
♦ FRIDAY, May 9, 2008	Educational Seminar; The Woodlands, Woodbury, NY
♦ May 21, 2008	Monthly Program Meeting — Using Trusts in Estate and Retirement Planning
♦ June 18, 2008	Monthly Program Meeting— Common Planning Strategies Post DRA

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

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