THE PLANNER

Vol. 5, No. 3 June 2005

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

"A Gold Level Chapter"

Dear Fellow FPA Member:

As mentioned in an earlier newsletter, each year the Chapter's Board of Directors and Past Presidents' Council conduct a "Strategic Planning Meeting." The purpose of this meeting is to review our strengths and weaknesses from the prior year, and to develop a strategic plan for the future. Some of the ideas implemented from last year's meeting include:

? ? Enhancing and diversifying our program "mix" to include more practice management, the "Fee Advisor Group," and some more advanced topics.

? ? Launching our Chapter's Pro Bono Program, (and presenting four well-received programs.)

? ? Conducting a "Membership Survey" to help get a "read" on your attitudes and preferences in a variety of categories. We have already begun to use your input to help plan for future FPA activities and events.

Our next "Strategic Planning Meeting" will be held in the 3rd week of July. All members are invited to email me at the chapter office ("FPALI@optonline.net") with any feedback and/or suggestions you may have to help make our FPA-LI an even stronger Chapter than we are today.

And speaking of membership – our best source of recruitment is you – our existing members. If you find your participation in the FPA to be meaningful, I encourage you to tell just one friend or colleague to join our group. (Why keep a good thing to yourself?) If you call or email Janet at the office, she can have a Membership Committee Volunteer get back with the benefits of membership.

Continued on Page 2

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FPA
THE FINANCIAL PLANNING ASSOCIATION

What's Happening –
Announcements from the Editor

> Our next program meeting will be held on **Wednesday, September 14th** from 5:30 to 8:10 PM at the Crest Hollow Country Club.

> The Annual Scott Hirschbein Memorial Golf Outing will be held on Monday, June 20th, 2005, at the Hamlet Wind Watch, Hauppauge, NY.

> Our next Annual Symposium and Exhibition will be held on **Friday, October 28, 2005** at the Crest Hollow Country Club, Woodbury, NY. See center pages for an Agenda and Registration Form

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

> Our chapter has purchased a set of cassettes from Success Forum 2003 that will be available for members to borrow. They will be available at our monthly program meetings.

> 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.

Thank You's
May & June 2005

Sponsors

? ? AIM Funds
? ? AmericanSkandis
? ? Curian Capital
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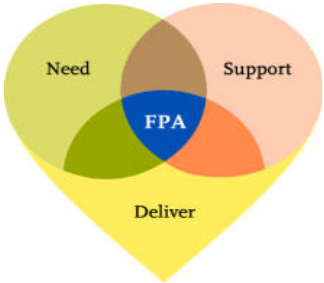
? ? Oppenheimer Funds
? ? US Allianz
? ? Van Kampen

Speakers

? ? Howard S. Eilen, Esq.
Lehman & Eilen LLP, Uniondale, NY
? ? John Hunter, BISYS Insurance Services
? ? Phillip C. Gallant
New York Long Term Brokers, Ltd.
and Advantage Financial Services, LLC

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.



President's Message
(Continued from Page 1)

Which reminds me – if you haven't been on the National FPA website (www.fpanet.org) lately, you should check it out. I think you'll be surprised to find a number of excellent resources and links (including the "Planner Search" program).

Wishing you all a wonderful Summer!

Yours truly,
Richard L. Bergen, CPA, CFP®

New Program for FPA Long Island Members!

Dear Fellow FPA Member:

The Long Island Chapter of the FPA is proud to announce a new program designed to assist you facilitate your way through our organization. The Past Presidents Council will now become a liaison for the members.

Our Past President's Council has been kind enough to volunteer to assist in this new program. When you come to a monthly meeting you will be greeted at the front desk by a Past President wearing a name tag identifying them as a Past President. You will have an opportunity at anytime to ask them any questions you might have regarding:

1) The Long Island FPA Chapter
2) How you might become more involved
3) Who the Committee Chairs are
4) If you like our Chapter, don't like our chapter
5) How we might improve your chapter
6) Do you need assistance in your business
7) Programs and services that would be of interest
8) Why you attend our meetings or don't

A list of our Past President's that have volunteer to become "Mentors" to the Members is below and we welcome you to call upon us for anything that you might need at all.

Thomasina Michalik, CFP
Chairman

List of Past Presidents

Philip J. Ashton, CFP®
Ashton Financial Services
631-491-0691
pjashton@optonline.net

Clifton J. Callahan, CFP®
631-724-3608
cjc4plans@aol.com

Jack Chite, CFP®
J. Chite & Associates, Inc.
631-244-8940
jackchite@aol.com

Joseph H. Clinard, Jr., CFP®
North Shore Capital Management
631-420-4242
JoeClinard@aol.com

Irving Cottler, CPA
Deloitte & Touche
Phone: 516-918-7796
Email: icottler@deloitte.com

Kathleen Keegan, CFP®
K-M Capital Inc.
631-420-4242
kakeegan@optonline.net

Michael D. Kresh, CLU, CFP®
M.D. Kresh Financial Services, Inc.
631-232-9170
mkresh@mdkresh.com

James E. Meyer
Arnone, Lowth, Mullady & Greco, LLC
631-423-0505
jmeyer@theheritagegroupllc.com

Thomasina Michalik, CFP®
Vanderbilt Financial Group
631-845-5100
tmichalik@vanderbiltsecurities.com

Andrew M. Rich, CFP®
Rich Advisory Corp.
516-433-0828

Eve Schniebolk Basso, CFP®
516-536-1438
eveschn@aol.com

Jon L. Ten Haagen, CFP®
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631-425-1966
wiseinvesting@tenhaagen.com

Diane E. Wilkie, Esq., CFP®
Wilkie & Wilkie
516-564-8301
dwilkie@wilkielaw.com

Membership

New Members
April - May 2005

Welcome To

Dawn Babcock, Lake Ronkonkoma, NY

Eric W. Baumbach, LUTCF,
Eagle Strategies Corp., E Meadow, NY

Michele Goldstein,
American Mortgage Group, Manhasset, NY

Anne Nancy Kubacz,
Kinemotive Corp., E Northport, NY

Daniella Mackey, Brooklyn, NY

John W. Martin,
Securities Advisors MidAmerica, Inc.,
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Steven A. Michalik,
Nationwide / Best of America, Farmingdale, NY

Jeanette Palma®, Coram, NY

Looking for a Few Good Planners: Howard Black Award Nominations Due August 15, 2005

The FPA of Long Island is seeking nominations for the Howard Black Award, which recognizes an individual who has made outstanding contributions to the financial planning profession. The award will be presented at The 6th Annual Symposium and Exhibition, October 28th, 2005. Nominees for the Howard Black Award should be professionals who have made a significant contribution to the financial planning profession in the areas of service to society, academia, government and in professional activities. They must also exemplify FPA's core values of integrity, competence, relationships and stewardship. Nominations are due by August 15th. A Nomination Form can be found on page 10 of this newsletter.

Anniversaries

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

20 Years

David J. Rothfeld, CPA	Hicksville	NY	June 1, 1985
David A. Savitz, CFP®	Oceanside	NY	June 1, 1985

10 Years

Todd M. Stepniewski, CFP®	Wantagh	NY	May 3, 1995
Gary W.Lofgren, CFP®	Glenwood Landing	NY	June 1, 1995
Joan Sabella, CFP®, CRPC	Merrick	NY	June 7, 1995

5 Years

Victoria Honohan, CFP®, CFS	Massapequa	NY	May 5, 2000
JoCarole Brodsky, CPA, CFP®	S Merrick	NY	May 12, 2000
Susan O'Connor	Long Beach	NY	May 12, 2000
Christine M. Parisi, CFP®	Bohemia	NY	June 1, 2000
Stuart M. Mordfin, CPA	Great Neck	NY	June 23, 2000

MEMBERSHIP SURVEY RESULTS & INSIGHTS

Once again we wish to thank our members who took the time to complete and return our "Annual Membership Survey." The results and insights were very helpful as well as interesting. The highlights are as follows:

- Our membership represents a full spectrum of financial service professionals.
- The members are mostly CFP's and Independent Practitioners. The largest crossover members and non-CFP's come from Tax Preparers, CPA's and Enrolled Agents.
- Many of our members are fee only or fee and commission practitioners.
- Over one half of our members are affiliated with independent and regional firms.
- Over 25% of our respondents were interested in getting involved as volunteers for pro-bono and public programs.
- Our members would like us to provide marketing, practice management, intermediate and advanced educational opportunities.

Both the Board and the Membership Committee will respond to the challenges and interests of our membership, but we will need your help. Please volunteer to join a committee and help us create and establish new educational opportunities as well as practice management programs. Don't be surprised when a board member contacts you directly to enlist your participation and assistance. Our local chapter has always been a role model for other FPA chapters. We have been recognized for excellence and will continue to meet the needs of our members. Your input will go a long way.

Finally, we are always looking for you to solicit friends and associates to join the FPA. Please make every effort to sponsor and promote new members. There are many incentives for new members as well as rewards for those who sponsor them. Please contact the Chapter Office at (516) 542-2004, David Savitz at (516) 766-8191, or Moss Kaufman at (631) 366-1999 for more information.

Moss Kaufman
Vice President Membership

VOLUNTEERS NEEDED

Your FPA Board of Directors is considering taking a booth at the Huntington Chamber of Commerce Fall Festival on the Weekend of October 8 - 9 (Columbus Day Weekend). The booth will be open from 8AM to 6PM and we need volunteers to man the booth in two or three hour shifts and we will need two to three people per shift.

This is the largest fall festival attracting upwards of 200,000 people. We believe this is a great opportunity to make the investing public aware of the benefits of working with a Certified Financial Planner vs.. a "financial consultant".

To make our decision as to whether to participate we need to know your indication of interest in helping to promote Financial Planning, the FPA and ourselves. If you would like to volunteer a few hours of your time on one or both of these days please contact Janet Cino at the chapter office ASAP by fax 516-524-2005, phone 516-542-2004 or email fpali@optonline.net.

Jon L. Ten Haagen, CFP is a board member on the Huntington Chamber of Commerce and the Chairman for the Huntington Fall Festival, so you can be pretty well assured of a good booth location! Any individual company considering taking a booth should also contact Janet. Jon will then get information to you in a timely manor.

Thank you in advance for your indication of interest in helping your chapter, your industry and yourself. Have a good summer, but first contact Janet!

Volunteer's Name: _____

Phone #:_____

Email: _____

Day and Time Available: _____

If Interested,
Contact the Chapter Office:
Phone: 516-542-2004
Fax: 516-542-2005
Email: fpali@optonline.net

FPA of Long Island
Preliminary Symposium Agenda
Friday, October 28, 2005

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)*** **Keynote Speaker: TBA**
10:30 - 11:00 a.m.	**EXHIBIT HALL OPEN - Break with Exhibitors**
11:00 a.m. - 11:50 a.m.	**Concurrent Sessions I** ?? **Trusts in an Elder Law Practice *(1 CFP and/or CPA CE credit)*** Speaker: Vincent Russo, Esq., Vincent J. Russo & Associates, P.C. ?? **Annuity Contract Ownership *(1 CFP and/or CPA CE credit and/or 1 NYS Ins. Credit)*** Speaker: Susan O'Connor, Nationwide/The Best of America ?? **Fee Advisor Track- Topic TBA *(1 CFP and/or CPA CE credit)*** Speakers: TBA ?? **Student Track- How to Pass the CFP Exam (No CE credit)** Speakers: Panel TBA
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** ?? **Divorce Planning *(1 CFP and/or CPA CE credit)*** Speaker: Nancy Kaye-Kirsch, CFP, CDP, $ound View Financial ?? **Asset Allocation *(1 CFP and/or CPA CE credit)*** Speaker: Richard McQuaid, Grantham, Mayo, Van Otterloo & Co. (GMO) LLC ?? **Practice Management and Student Track- Best practices for Building a Successful Financial Planning Practice and Career (No CE credit)** Speakers: Panel TBA ?? **How to Present Like a Pro (No CE credit)** Speaker: Wendy Gold, President of Firelands Communication
1:00 - 2:30 p.m.	**Lunch *(1 CFP and/or CPA CE credit)*** **Luncheon Speaker: CONGRESSMAN STEVE ISREAL**
2:30 - 2:50 p.m.	**EXHIBIT HALL OPEN - Raffle**
2:50 p.m. - 3:40 p.m.	**Concurrent Sessions III** ?? **Fixed Income *(1 CFP and/or CPA CE credit)*** Speaker: Thomas Sorrell, Executive VP and CIO, Guardian Life Insurance ?? **The Pitfalls of Retirement Plan Distributions (*1 CFP and/or CPA CE credit*)** Speaker: Victor Finmann, Esq., Victor M. Finmann, PC ?? **Reverse Mortgages *(1 CFP and/or CPA CE credit)*** Speaker: David Peskin, Founder & President of Mortgage Warehouse, Vertical Lend and Boulder Financial Group
3:40 - 3:50 p.m.	**Afternoon Break**
3:50 - 5:30 p.m.	**Post-Conference Session *(2 NYS Insurance and/or CFP and/or CPA CE credits)*** **Long Term Care Insurance Topic(s) TBA** Speaker: TBA

Congressman Steve Israel Robert Katz Vincent Russo

SYMPOSIUM & EXHIBTION 2005

October 28, 2005 – Crest Hollow Country Club, Woodbury, NY

A Huge ***"Thank You"*** to the Sponsors & Exhibitors who generously contributed to make this program possible! (The following list represents sponsors as of June 10, 2005).

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Oppenheimer Funds

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Federated Investors
JennisonDryden Funds

Silver Level ($800 and up)
Access Brokerage Services
The Alger Fund
American Stock Exchange
AXA / Equitable
Claymore Securities
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Vertical Lend
Wells Real Estate Funds

- -

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 28, 2005, Crest Hollow Country Club, Woodbury, NY

Once again 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 28, 2005, at the Crest Hollow Country Club in Woodbury. Many of the speakers and topics are already lined up for the day. I am pleased to announce that Congressman Steve Israel has agreed to be our Luncheon Speaker. You can look forward to Bob Katz starting things off as our pre-conference speaker. There will be Vincent Russo speaking on Trusts in an Elder Law Practice, Victor Finmann speaking on the Pitfalls in Retirement Plan Distributions, and many other fine speakers and topics lined up for the day.

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.

Again this year we will offer a Practice Management Track and a CFP Student Track designed to help new financial planners and students get a successful start. This track is for you if you are a student interested in financial planning or have just entered into the practice of financial planning. Gain solid, practical information from experienced, successful financial planners on how to develop a financial planning practice and where to find financial planning career opportunities. (There are no CE credits offered for any of the Practice Management or Student Track sessions).

Register Now, if you haven't already! Looking forward to seeing you on October 28th!

Louis J. Cino
Vice-President, Symposium 2005

Symposium 2005:
October 28, 2005 - Crest Hollow Country Club, Woodbury, NY

Name: _____

Company: _____

Address: _____

City: _____ Zip: _____

Badge Name: _____ Phone: _____

Email: _____ Fax: _____

CFP License #: _____ NYS License #: _____

Rates:	5/14/05-10/14/05	10/15/05-10/28/05
Member	$150.00	$200.00
Non-Member	$200.00	$250.00

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 14, 2005. Refund will not be granted after October 14, 2005, however substitutions can be made at any time at no charge.

Government Relations

Submitted by Marie Rolston, CFP®

FPA Files New Lawsuit Against SEC

The Financial Planning Association announced that it had filed a petition in the U.S. Court of Appeals challenging the SEC's final rule exempting certain broker-dealers from requirements of the Investment Advisors Act of 1940. Further info can be found on the Web sites of The Wall Street Journal and Chicago Tribune.

President Signs Bankruptcy Bill Into Law

President Bush has signed S. 256, The Bankruptcy Abuse Prevention and Consumer Protection Act of 2005, into law. In general, the law requires individual debtors who have the means to pay to enter into a repayment plan under Chapter 11 (Reorganization) or Chapter 13 rather than having their debts cancelled under Chapter 7 (Liquidation). The FPA has prepared a summary of the new law by going to www.fpanet.org.

Supreme Court Rules Creditors May Not Seize IRA Assets

To view the opinion, go to www.supremecourtus.gov/opinions/04slipopinion.html and click on Rousey v. Jacoway.

House Passes Deposit Insurance Reform

The legislation increases deposit insurance coverage for individual accounts to $130,000 and indexes future coverage limits to inflation.

President Expected to Approve Bigger Combat Death Benefits

Visit online for a summary and enter H.R. 1268 or H. Rpt. 109-72 into the search function.

Lawmakers to Propose Permanent Exemption for College Savings Plans

House Ways and Means Committee members will introduce legislation to make permanent the federal tax-exempt treatment of qualified tuition or college savings plan that has been established by states under Section 529 of the Internal Revenue Code.

President Calls for Social Security Reform and Creation of Personal Accounts.

The accounts would be modeled along the lines of the federal employee's Thrift Savings Plan and would be offered on a voluntary basis to workers born after 1950. The Bush plan would allow workers to contribute a maximum of 4% of their wages to the new accounts up to a maximum of $1,000 per year initially.

Many Thanks to Our 2004-2005

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The Gathering of the Global Financial Planning Profession
September 15-18, 2005
Register by July 29 and save $200–
Visit www.FPAAnnualConvention.org today.

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	631-845-5101
Symposium VP– Lou Cino	516-678-5000x6357
Directory VP- Jim Graziano	718-848-7200
Sponsors VP- Tommie Michalik	631-845-5101
Membership VP– Moss Kaufman	631-366-1999
Communication VP- Michael Baras	516-481-0994
Public Relations VP- Michael Kresh	631-232-9170
Govt Affairs VP- Marie Rolston	631-289-1876
Ethics VP- Ray Mignone	718-229-2514

The Scott Hirschbein
Memorial Golf Outing
Monday, June 20, 2005

Thank You To All of Our Sponsors

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Lunch Sponsored by Tax Partner Alliance
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MainStay Funds, MetLife Investors,
MFS Investment Management,
Nationwide / "The Best of America",
Pacific Life & Annuity Company,
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VanKampen Funds

Take Advantage of Free Online CE Credits

Your FPA® membership entitles you to 12 free continuing education (CE) online exams per year to help satisfy your CE requirements for the CFP® certification. Access these CE exams within the *Journal of Financial Planning* area of the FPA Web site (www.fpanet.org). When the page loads, scroll down for a link that reads, "Click here to go to the online exams." After logging on with your FPA member name and password, you'll access a page listing available online exams. The page will also indicate how many credits remain out of your annual total.

Upon successful completion, you'll receive a certificate via e-mail, and FPA will submit results to CFP Board at no cost. These online credits are not transferable. Unused credits cannot be carried over to your next membership period.

Tommie Michalik
and the entire team at
Vanderbilt Securities, LLC
welcomes the affiliation of
Jack Chite, CFP®

Jack is an established
Financial Advisor and a
trusted colleague on
the Board of Directors of the FPA

We are proud that Jack has
selected us as his
Broker/Dealer of choice

Financial Planning Awareness Week in Autumn 2005

The FPA annually celebrates Financial Planning Awareness week each Fall to promote the concepts of financial planning. On Saturday, October 22, 2005, 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. Previous years have enjoyed 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 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 15, 2005

I. Nominees Name: _____

Address: _____ City / State / ZIP: _____

II. Professional Designations Held: _____

III. Professional Organization Membership: _____

IV. Service and Contribution to the Financial Planning Profession:
( ) Lecturer ( ) Teacher / Instructor ( ) Authorship ( ) Boards/Committees ( ) Other
(Describe in attachment)

V. Service to the Public:
( ) Civic ( ) Charitable / Volunteer ( ) Other: ***(Describe in attachment)***

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 15, 2005.
The Award will be presented at the FPA of Long Island's Symposium on October 28, 2005.
We hope all members will aspire to nominate a colleague of themselves for this prestigious recognition of their peers.

You've planned for your clients,
But Have You Planned Your Own Retirement?

WE ARE INTERESTED
In Acquiring Your Practice!

Call Mark J. Snyder 631.289.4224

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Free Guest Pass

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

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

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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

? ?	**June 15, 2005**	**Monthly Program Meeting: Long Term Care Insurance Revisited**
? ?	**June 20, 2005**	**Scott Hirschbein Memorial Golf Outing**
? ?	**September 14, 2005**	**Monthly Program Meeting**
? ?	**September 28, 2005**	**Required CFP® Ethics Course**
? ?	**October 22, 2005**	**Public Awareness Event - Senior Expo**
? ?	**October 28, 2005**	**The 6th Annual Symposium and Exhibition**
? ?	**November 16, 2005**	**Monthly Program Meeting**
? ?	**December 14, 2005**	**Monthly Program Meeting**

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

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FPA
THE FINANCIAL PLANNING ASSOCIATION

FPA of Long Island
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East Meadow, NY 11554-2522