

LEADERSHIP IN ACTION

FPA members inspire others in many ways, helping lead in their practice, local chapter, community, family, and especially with their clients. FPA's Leadership in Action helps highlight these "everyday" qualities of our members and remind us that we all have opportunities to lead.

GOING THE EXTRA MILE FOR THE PROFESSION



Karl Frank, Member since 2004

A & I Financial Services LLC
Englewood, Colo.

“You make a living by what you get, but you make a life by what you give.”

—Sir Winston Churchill

A Leader in the Profession:

Karl is a leader in the Denver business and financial planning communities. He sits on the Board of Directors for FPA of Colorado and leads his chapter's public relations efforts. He is a frequent spokesperson for the media and other groups on the value of financial planning, and is also actively involved with the Metro Denver Chamber of Commerce as a volunteer ambassador and a member of the CEO Exchange.

A fellow chapter member says of Karl: “He gives tirelessly to our profession, our local chapter, and people in need. He has formed a local speaker's bureau, forged media relations with local TV and newspapers, and spearheaded Denver Financial Planning Day. At times, when our board was lean, he took on the public relations and pro bono efforts, and did a fabulous job at both!” And, always extremely appreciative toward volunteers, he often lends a personal touch by hosting “thank you” barbecues for those who donated their time. “We're so lucky to have Karl on our board!”

Another member speaks of Karl's passion for—and commitment to—the financial planning profession. “He freely gives his time to build and support awareness and education within the community about how a financial planner can make a difference in people's lives. Karl's the kind of guy who will always make sure people are well taken care of and receive the services they need.”

Karl is a contributor to the *Denver Business Journal*, and his exit planning work for business owners was featured in *Financial Advisor* magazine.

Lessons Learned:

- Go the extra mile for your profession and for your clients
- Understand the vision as well as the details that are needed to make things happen
- When you give of yourself, that's when you truly give

Karl's Leadership Portfolio:

In addition to Karl's active involvement with FPA of Colorado, he has also played an instrumental volunteer role in the success of Denver Financial Planning Day. He is a member of the Million Dollar Roundtable, an international organization of roughly 40,000 advisers and insurance professionals. He was one of less than 30 advisers in Colorado to achieve the Top of the Table status in 2008 and 2009. Karl holds master's degrees in business administration, finance, and English, and has also earned his CFP designation.