FPA-Northern New England

The Financial Planning Association of Northern New England
(603) 228-1231, 53 Regional Drive, Concord, NH 03301-8500

November 2009, Volume 1, Issue 1

Board Members

President:
Thomas Space, CFP®, CTFA
Advisors Financial Planning Group, LLC

Chairman/Past President:
Darlene Simard, CFP®, CLTC, MBA
Citizens Investment Services

President-Elect/CFP & NH CEs:
Ronald Valpey, CFP®
Focus Capital

Secretary:
Kevin Desmond, CIC
Chubb Personal Insurance

Treasurer:
A. Bruce Carri, CFP®, CPA/PFS
A. Bruce Carri CPA

Membership:
Thomas Wagner, CFP®, MBA
Summit Wealth Group, LLC

Sponsors:
Torrey Greene, CRPC
Greene & Associates
Integrated Retirement Strategies

Govt. Relations & Chapter Recognition:
Frank Sapareto, CFS, RFC, RFP
FVS Financial

Scholarships:
Milton (Sandy) Martin
Martin Family Enterprises

Charitable Giving:
Lawrence Faretta, CFP®
Trust Advisory Group, Ltd.

Programs:
Mike Bonacorsi, CFP®
Mike Bonacorsi, LLC

Financial Planning Week:
Laurie L. Chandler, CFP®
Vigilant Capital Management

Public Relations:
Robert K. Gustafson, CFP®
R.K. Gustafson Financial

Director/Newsletter:
Nathan Alger
Ameriprise Financial Services

Director/Sponsors:
Darin P. Pope, CFA, CFP®, CTFA, MBA

Thoughts from the President

FPANNE, Chapter President, Thomas Space, CFP®, CTFA

We have established this newsletter in an effort to reach out to our membership contingent in Maine, New Hampshire and Vermont, to keep our members posted of current and future FPA events in the Northern New England Region, to promote out sponsors and to keep our members up to date on topics relevant to the financial planner in the industry.

I encourage you to not only read the articles and highlights but to take a proactive approach and come to our meetings that are scheduled. Our next meeting scheduled for October 23rd at the York Harbor Inn, has an action packed agenda and can be a great opportunity to meet other financial planning professionals, but to also get your CE's for the upcoming year.

I look forward to meeting you at an upcoming meeting!
Regards—Tom

Board Member of the Month

Torrey L. Greene, CRPC ®, CRC®

Learn about Board Member, in charge of FPANNE Sponsorship:
Torrey is a Chartered Retirement Planning Counselor™ designee with over 20 years of experience in the financial services industry and has worked as a partner and officer for both large and small organizations sharing his vision for success. In 2004, he opened his current office in Newport, New Hampshire so that he could continue to pursue his passion for helping individuals and business owners find greater clarity and confidence in their financial lives.
Trade Associations and Boards:
-Past President and current member of the Northern New England Chapter of the Financial Planning Association.
-Past President of the New Hampshire Chapter of the International Association of Financial Planning.
-Current member of the OMEGA group, a small invitation only, group of diverse International Financial Planners whose sole interest is providing clients with the "best practices" by having available access to internationally recognized practices that are active in all levels of financial planning.
Torrey received BS, from the University of New Hampshire in 1981. Torrey twice served as a National Taskforce member with the Financial Planning Association for their Annual International Conference.Advisory Board Member with Jones and Babson Mutual funds out of Kansas City, from 1998 to 2003. Torrey is a former Board Member for the New Hampshire Health Insurance Underwriters Association, holding several positions. He continues, as in the past, to be an active member on several local boards for charitable community and non-profit organizations.

Contents

FPA Events 2

Sponsor Story and Information 3

News, Articles and Industry Infromation 4

Help FPA promote our industry on Capital Hill by supporting FPA-PAC.

Visit www.fpanet.org to learn more.

Supporting FPA's Pro Bono Programs…the Foundation for Financial planning

Visit

www.foundation-finplan.org

Keep up to date with your CFP continuing education requirements!

Register today to join us in York Harbor, ME!

Upcoming meetings

Please Join US for our next meeting of The Financial Planning Association of Northern New England!!

When: October, 23rd 2009

Where: York Harbor INN

Coastal Route 1A, 480 York Street, York Harbor, ME

How: For reservations call 1-800-343-3869

Special FPA

Join the Membership Cocktail Reception

Will you be arriving the evening before the seminar?

Please join us on October 22nd for a membership cocktail hour from 5:30-6:30pm at the York Harbor Inn.

The membership cocktail reception is being Sponsored by Sentinel Investments', Regional VP Steven Beaulieu.

Come meet other members of The Northern New England FPA and meet other professionals in the industry!!

See you at the reception!

2009 FPA Conference

2009 National Conference FPA Anaheim October 10–13

For more information please visit: www.fpanet.org

Morningstar Investment Services

Our program provides a number of key advantages in helping you serve your clients and manage your business.

Simplified Investment Management Decisions

Between investment choices, research requirements, and compliance demands, investing tasks can consume a large amount of your time. We perform the due diligence, market monitoring, portfolio construction and management, and account rebalancing—which lets you spend more time on building client relationships.

Consistent Investment Process

Our disciplined approach to investing translates into few surprises for you and your clients. We strive to manage the portfolios—and your clients' accounts—for consistent, long-term, risk-sensitive results.

Diversified Array of Investment Products

From asset allocation strategies, to retirement income portfolios, to our new stock portfolios, we provide you with an extensive and appealing suite of tools to meet client needs.

Value-Added Features

Informative proposals, portfolio comparison tools, streamlined account-opening packages, individual account rebalancing, and quarterly account statements are just some of the features of our service that put you in a strong position to build your business by serving your clients well.

Responsive Service Team

Our focus on service means we can help you with everything from opening accounts, to creating prospecting campaigns, and explaining investment strategies to your clients.

Get Started Today

For more information, contact Eric Kellar, Regional Sales Director at:
877 626-3224
or
eric.kellar@morningstar.com

FPA-NNE Sponsors

Chubb Personal Insurance
Kevin D. Desmond, CIC
Regional Manager

Curian Capital
Jentry L. Jordan
Regional Business Consultant

I-Marketing Management
Laurie Donohue
Executive Director

Jackson National Life
Carissa Miller, CFS, CSA
Regional VP

Manager's Investment Group
Jason S. Swedo, AIF®
Regional Manager, VP

Morningstar Investment Services
Eric Kellar
Regional Sales Director

SEI Investments
Andy Donahue

Sentinel Investments
Steve Beaulieu, CISP
Regional Vice President

The Smith Company
Bill Bonk
Director of Annuity Sales

The Smith Company
JoAnn H. Lemieux
Associated General Agent/Estate Planning Specialist

UMB Asset Management
Craig Schwalb
Assistant Vice President

News Articles and Industry Information

Articles from September/October 2009 *Practice Management Solutions* magazine:

Big Software, Little Price
By Jonathan Stoddard
Small-business software doesn't need to cost a lot of money. In fact, a lot of it is free.

Understanding Technology Integration
By Jeremy Condie
Advisers who use integrated technologies earn more money, but what does "technology integration" mean?

Mobile Applications Transform the Financial Adviser
By André Guillemin
Use technology to redefine the way you do your job.

Health Insurance Options for Entrepreneurs
By Carly Schulaka
Ideas for getting good coverage without breaking the bank.

Today's Struggles Are Tomorrow's Strengths
By Joni Youngwirth
Lessons learned from the financial crisis.

7 Steps to Mastering Motivation and Momentum
By Daniel C. Finley
What you need to kick-start your business.

Conferences: Bang for the Buck
By Kirk Hulett
Plan ahead to benefit from your investment.

How to Set 5 Appointments a Day
By Jim Komoszewski
With your schedule full, you'll be more productive.

Anatomy of an Ownership Transition
By Sam Hull, CFP®, RLP®, CPCC
The critical steps you should take, from beginning to end.

Practitioner Earnings Relate to Learning
By Jesse Arman, Ph.D.
The more you know, the more you can earn.

Add Value with Meeting Follow-Up Letters
By Elizabeth Jetton, CFP®
Leverage the impact of client meetings.

Back to Basics
By Jon Ulin, CFP®
Fundamental marketing ideas will help you stay afloat.

Leverage Centers of Influence
By Jerry Lezynski
Best practices for creating a productive COI network.