# FPA's 2011 Financial Planning Week®

FPA is pleased to announce that hundreds of Americans discovered the value of financial planning during its tenth annual FPA Financial Planning Week® in October. FPA Financial Planning Week brings together those who need, support and deliver financial planning. FPA Financial Planning Week builds awareness of the financial planning process to help individuals make smart financial decisions.

In celebration, FPA and its nationwide network of chapters conducted events across the country, including *Financial Planning Days*, educational seminars, hotlines and interviews – more than 50 events and 25 proclamations were secured nationwide. Through our efforts, the following activities were achieved:

- FPA was featured in a special section of *The Wall Street Journal* for the eighth time in September. The supplement, "Private Wealth Management," was published in conjunction with FPA Experience 2011 and included a special message from FPA President Marty Kurtz, CFP®, AIFA®. *The Wall Street Journal* reaches nearly 2 million readers with its Saturday edition.
- FPA teamed up with Junior Achievement (JA) for the fifth time to teach elementary, junior and high school student's basic money management skills. FPA members volunteered to deliver financial literacy programs to students in schools nationwide.

In addition to the traditional Financial Planning Week activities, we were excited to work with chapters to coordinate *Financial Planning Days* for the second year in October 2011. *Financial Planning Days* was created in partnership with FPA, Certified Financial Planner Board of Standards, Foundation for Financial Planning and The U.S. Conference of Mayors. *Financial Planning* Days is an effort to help Americans with their financial planning needs through a series of clinics and educational workshops powered by the financial planning community and embraced by city governments nationwide. As part of *Financial Planning Days*, qualified and experienced financial planners provided free, no-strings attached advice and education in 31 cities nationwide this year. Through these events, we aspire to help Americans discover the value of financial planning, improve the nation's economic stability, and develop and implement sustainable community programs that continue to grow and support our initiative over time by empowering thousands of individuals with financial planning information. Learn more about *Financial Planning Days*.

FPA continues to celebrate the value of financial planning and the financial planning profession throughout the year. As a chapter leader, you are an important ambassador for our organization and a crucial component to everything we do. For this reason, we appreciate your support to these innovative community programs. Learn more about our efforts to help American's understand the importance of financial planning and engaging an ethical, competent financial planner.

Learn more about FPA Financial Planning Week and mark your calendar for next year's celebration, October 1-7, 2012.

Please see the following pages for more details regarding FPA's 2011 Financial Planning Week activities and proclamations.

# FPA's 2011 Financial Planning Week Activities

## Alabama

**October 1, 2011 (10:00 a.m. — 4:00 p.m.)**
The Financial Planning Association of North Alabama will host a Financial Planning Week Kickoff event on October 1st at the Riverchase Galleria Mall in Hoover, Ala. Individuals will have an opportunity to meet with FPA members and CFP® professionals for free advice. In addition, Stewart Welch, CFP practitioner and popular author of several financial planning books, will speak at 10 a.m. A number of financial outreach organizations, such as Consumer Credit Counseling, will be on site with information on financial management for attendees. This event is free to the public.

## Arizona

**October 22, 2011 (10:00 a.m. – 2:00 p.m.)**
Attend *Mesa Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 22 at the City of Mesa Main Library in Mesa, Ariz. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Mesa Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Mesa Financial Planning Day* is available at www.FinancialPlanningDays.org/Mesa or by calling 877-861-7826. Walk-ins are also welcome.

## California

**October 1, 2011 (9:00 a.m. – 4:00 p.m.)**
Attend *Oakland Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 1 at Oakland City Hall in Oakland, Calif. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Oakland Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Oakland Financial Planning Day* is available at www.FinancialPlanningDays.org/Oakland or by calling 877-861-7826. Walk-ins are also welcome.

**October 8, 2011 (9:00 a.m. – 3:00 p.m.)**
Attend *Greater Sacramento Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 8 at West Sacramento City Hall in Sacramento, Calif. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting,

getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Greater Sacramento Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Greater Sacramento Financial Planning Day* is available at www.FinancialPlanningDays.org/GreaterSacramento or by calling 877-861-7826. Walk-ins are also welcome.

**October 8, 2011 (10:00 a.m. – 3:00 p.m.)**
Attend *San Diego Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 8 at Joe & Vi Jacobs Center in San Diego, Calif. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*San Diego Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *San Diego Financial Planning Day* is available at www.FinancialPlanningDays.org/SanDiego or by calling 877-861-7826. Walk-ins are also welcome.

**October 8, 2011 (10:00 a.m. – 4:00 p.m.)**
Attend *Orange County Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 8 at Brandman University, Irvine Campus in Irvine, Calif. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Orange County Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for *Orange County Financial Planning Day* is available at www.FinancialPlanningDays.org/OrangeCounty or by calling 877-861-7826. Walk-ins are also welcome.

**October 15, 2011 (9:00 a.m. – 2:00 p.m.)**
Attend *Los Angeles Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 15 at Magnolia Place in Los Angeles, Calif. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income

taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Los Angeles Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Los Angeles Financial Planning Day* is available at www.FinancialPlanningDays.org/LosAngeles or by calling 877-861-7826. Walk-ins are also welcome.

**October 22, 2011 (9:00 a.m. – 4:00 p.m.)**
Attend *San Francisco Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 22 at UC-Hastings College of the Law in San Francisco, Calif. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*San Francisco Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *San Francisco Financial Planning Day* is available at www.FinancialPlanningDays.org/SanFrancisco or by calling 877-861-7826. Walk-ins are also welcome.

**October 29, 2011 (10:00 a.m. – 5:00 p.m.)**
Attend *Silicon Valley Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 29 at the King Library in San Jose, Calif. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Silicon Valley Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Silicon Valley Financial Planning Day* is available at www.FinancialPlanningDays.org/SiliconValley or by calling 877-861-7826. Walk-ins are also welcome.

## Colorado

**October 22, 2011 (9:00 a.m. – 2:00 p.m.)**
Attend *Denver Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 22 at North High School in Denver, Colo. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income

taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Denver Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Denver Financial Planning Day* is available at www.FinancialPlanningDays.org/Denver or by calling 877-861-7826. Walk-ins are also welcome.

## Florida

**October 4, 2011 (11:30 a.m.)**
The Financial Planning Association of Greater Fort Lauderdale is teaming up with the Sun Sentinel to host an online chat on October 4. Financial planners will be online to chat with the public regarding their financial issues and concerns.

**October 8, 2011 (8:30 a.m. — 1:00 p.m.)**
The Financial Planning Association of the Suncoast will host a "Super JA Day" on Saturday, October 8, 2011, from 8:00 a.m. to 1:30 p.m. at the USF campus. In coordination with JA and the Sarasota Schools, FPA invites students from the 8th grades at Booker and Brookside Middle Schools to attend this event. Students wishing to attend must be accompanied by a parent or guardian and will participate in the lessons being taught. The lesson curriculum will focus on those areas that may be most important to financial security: budgeting, cash flow and credit usage. Lessons and activities are from the "Economics for Success," plus a lesson from the NEFE Financial Planning curriculum.

**October 29, 2011 (10:00 a.m. – 2:00 p.m.)**
Attend *South Florida Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 29 at McArthur High School in Hollywood, Fla. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*South Florida Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *South Florida Financial Planning Day* is available at www.FinancialPlanningDays.org/SouthFlorida or by calling 877-861-7826. Walk-ins are also welcome.

## Georgia

**October 8, 2011 (9:00 a.m. – 5:00 p.m.)**
Attend *Atlanta Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 8 at the Atlanta Workforce Development Agency in Atlanta, Ga. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Atlanta Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Atlanta Financial Planning Day* is available at www.FinancialPlanningDays.org/Atlanta or by calling 877-861-7826. Walk-ins are also welcome.

## Hawaii

**October 4, 2011 (7:00 a.m.)**
The Financial Planning Association of Hawaii and “Action Line” will promote Financial Planning Week with an interview segment on KHON2 News Morning News. The interview will be replayed during the afternoon/evening news.

**October 5, 2011 (7:00 a.m.)**
The Financial Planning Association of Hawaii and “Action Line” will promote Financial Planning Week with an interview segment on KHON2 News Morning News. The interview will be replayed during the afternoon/evening news.

**October 5, 2011 (11:00 a.m. – 1:00 p.m.)**
The Financial Planning Association of Hawaii will partner with local KHON2 News and "Action Line," a non-profit that promotes dally "Call-Ins" from the public about information and/or complaints, to promote financial awareness. FPA members will handle all the incoming calls to "Action Line" from 11:00 a.m. – 1:00 p.m. to promote financial awareness, answer consumer questions and provide financial resources and information.

**October 6, 2011**
The Financial Planning Association of Hawaii will have an interview segment on KHON2 News' Elderhood Project – a weekly segment dedicated to senior issues – in the morning and afternoon segments.

**October 6, 2011 (11:00 a.m. – 1:00 p.m.)**
The Financial Planning Association of Hawaii will partner with local KHON2 News and "Action Line," a non-profit that promotes dally "Call-Ins" from the public about information and/or complaints, to promote financial awareness. FPA members will handle all the incoming calls to "Action Line" from 11:00 a.m. – 1:00 p.m. to promote financial awareness, answer consumer questions and provide financial resources and information.

## Illinois

**October 22, 2011 (10:30 a.m. – 2:00 p.m.)**
Attend *Chicago Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 22 at Harold Washington Library Center in Chicago, Ill. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Chicago Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online

registration for the *Chicago Financial Planning Day* is available at www.FinancialPlanningDays.org/Chicago or by calling 877-861-7826. Walk-ins are also welcome.

## Indiana

**October 15, 2011 (10:00 a.m. – 3:00 p.m.)**

Attend *Indianapolis Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 15 at the University of Indianapolis in Indianapolis, Ind. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Indianapolis Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Indianapolis Financial Planning Day* is available at www.FinancialPlanningDays.org/Indianapolis or by calling 877-861-7826. Walk-ins are also welcome.

## Kentucky

**October 8, 2011 (10:00 a.m. – 4:00 p.m.)**

Attend *Louisville Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 1 at Spaulding University – Egan Center in Louisville, Ky. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Louisville Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Louisville Financial Planning Day* is available at www.FinancialPlanningDays.org/Louisville or by calling 877-861-7826. Walk-ins are also welcome.

## Maryland

**October 29, 2011 (10:00 a.m. – 4:00 p.m.)**

Attend Baltimore Financial Planning Day to get free, no strings attached financial advice from professional financial planners on October 29 at Frederick Douglass Senior High School in Baltimore, Md. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

Baltimore Financial Planning Day is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving

city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the Baltimore Financial Planning Day is available at www.FinancialPlanningDays.org/Baltimore or by calling 877-861-7826. Walk-ins are also welcome.

## Massachusetts

**October 3, 2011 (12:00 – 1:00 p.m.)**
The Financial Planning Association of Massachusetts will offer a "Brown Bag" lunch seminar on October 3 from 12:00 – 1:00 p.m. at the West Falmouth Library in Falmouth, Mass. The seminar will focus on retirement planning. The program is designed to help consumers make wise decisions concerning personal finances. There is no cost, no obligation and there will be no solicitation. The seminar is purely educational, designed to improve financial literacy in our communities. Registration is not required, but is suggested by calling the library at 508-548-4709.

This seminar will be repeated in several locations across Cape Cod during Financial Planning Week (October 3rd - 9th). This particular session is sponsored by West Falmouth Library and the Financial Planning Association of Massachusetts.

**October 3, 2011 (12:00 – 1:00 p.m.)**
The Financial Planning Association of Massachusetts will offer a "Brown Bag" lunch seminar on October 3 from 12:00 – 1:00 p.m. at the Eldridge Library in Chatham, Mass. The seminar will focus on retirement planning. The program is designed to help consumers make wise decisions concerning personal finances. There is no cost, no obligation and there will be no solicitation. The seminar is purely educational, designed to improve financial literacy in our communities. Registration is not required, but is suggested by calling the library at 508-548-4709.

This seminar will be repeated in several locations across Cape Cod during Financial Planning Week (October 3rd - 9th). This particular session is sponsored by Eldridge Library and the Financial Planning Association of Massachusetts.

**October 3, 2011 (12:30 p.m.)**
The Financial Planning Association of Massachusetts will host a seminar, “Planning for the Costs of Education,” on October 3 at the Boston Public Library in Boston, Mass. Jeanne Gibson Sullivan, CFP®, will discuss saving for college and how to pay for college. Parents and grandparents are welcome to attend.

**October 4, 2011 (6:30 – 8:00 p.m.)**
The Financial Planning Association of Massachusetts will host a seminar, “Money Matters: Real World Retirement Planning,” on October 4 at the Tewksbury Library in Tewksbury, Mass. Deborah Maloy, CFP® and past president of the Massachusetts Chapter of the Financial Planning Association, will give a presentation on how to prepare for retirement.

**October 6, 2011 (11:45 a.m. – 1:15 p.m.)**
The Financial Planning Association of Massachusetts will host a seminar, “Saving Fitness,” on October 6 at the JFK Building in Boston, Mass. Representatives from the Department of Labor, the Financial Planning Association and Social Security will give a presentation to those new to the work force on how to save and invest, what to look for in employee benefits and Social Security considerations. To reserve your space, please call Kristy Phillips at the Department of Labor 617-565-1396

**October 6, 2011 (6:30 – 8:30 p.m.)**
The Financial Planning Association of Massachusetts will host a seminar, “Investment Strategies,” on October 6 at the Malden Y in Malden, Mass. Kimberley Feeney Zollo, CFP®, will present a basic investing education at the Malden Y as part of their Wi$eUp program. Preregistration is required, $10 admission, 781-322-3760.

**October 6, 2011 (7:00 p.m.)**
The Financial Planning Association of Massachusetts will host a seminar, “Investing Basics: Be a Smarter Investor,” on October 6 at the Winchester Library in Winchester, Mass. Matthew Lasker, CFP®, and Jenifer Cannon will provide a presentation on how to approach investing. Presentation is suitable for all ages.

**October 18, 2011 (3:30 – 4:30 p.m.)**
The Financial Planning Association of Massachusetts will host a seminar, “Money School: Tips for Developing Good Financial Habits,” on October 18 at the Morse Institute Library in Natick, Mass.

**October 20, 2011 (3:30 – 4:30 p.m.)**
The Financial Planning Association of Massachusetts will host a seminar, “Money School: Tips for Developing Good Financial Habits,” on October 20 at the Morse Institute Library in Natick, Mass.

## Minnesota

**October 8, 2011 (10:00 a.m. – 2:00 p.m.)**
Attend *Twin Cities Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 8 at Hennepin County Library in Minneapolis, Minn. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Twin Cities Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Twin Cities Financial Planning Day* is available at www.FinancialPlanningDays.org/TwinCities or by calling 877-861-7826. Walk-ins are also welcome.

## Missouri

**October 3, 2011 (6:00 – 8:00 p.m.)**
The Financial Planning Association of Greater Kansas City will host Pro Bono Financial Counseling Sessions on October 3 at the Waldo Library located in Kansas City, Mo. Participants will be able to meet with a Certified Financial Planner™ for 15 minutes in order to ask questions regarding financial planning issues.

**October 3, 2011 (6:00 – 8:00 p.m.)**
The Financial Planning Association of Greater Kansas City will host Pro Bono Financial Counseling Sessions on October 3 at the Plaza Library located in Kansas City MO. Participants will be able to meet with a Certified Financial Planner™ for 15 minutes in order to ask questions regarding financial planning issues.

**October 4, 2011 (4:30 – 7:00 p.m.)**
The Financial Planning Association of Greater Kansas City will participate on NBC Action News Call-In Show on October 4. FPA will be available to answer financial planning questions from call-in viewers.

**October 8, 2011 (10:00 a.m. – 12:00 p.m.)**
The Financial Planning Association of Greater Kansas City will host Pro Bono Financial Counseling Sessions on October 8 at the Bluford Library located in Kansas City MO. Participants will be able to meet with a Certified Financial Planner™ for 15 minutes in order to ask questions regarding planning issues.

## Nebraska

**October 15, 2011 (8:30 a.m. – 12:30 p.m.)**
Attend *Omaha Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 15 at Metropolitan Community College - Fort Omaha Campus in Omaha, Neb. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Omaha Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Omaha Financial Planning Day* is available at www.FinancialPlanningDays.org/Omaha or by calling 877-861-7826. Walk-ins are also welcome.

## Nevada

**October 1, 2011 (8:00 a.m. – 12:00 p.m.)**
Attend *Las Vegas Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 1 at the Mel C. Kalagian Downtown Senior Center in Las Vegas, Nev. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Las Vegas Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Las Vegas Financial Planning Day* is available at www.FinancialPlanningDays.org/LasVegas or by calling 877-861-7826. Walk-ins are also welcome.

**October 1, 2011 (8:00 a.m. – 12:00 p.m.)**
Attend *Reno Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 1 at Wooster High School in Reno, Nev. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Reno Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Reno Financial Planning Day* is available at www.FinancialPlanningDays.org/Reno or by calling 877-861-7826. Walk-ins are also welcome.

## New Jersey

**October 15, 2011 (10:00 a.m. – 3:00 p.m.)**

Attend *Newark Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 15 at the Science Park High School in Newark, N.J. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Newark Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Newark Financial Planning Day* is available at www.FinancialPlanningDays.org/Newark or by calling 877-861-7826. Walk-ins are also welcome.

**October 22, 2011 (9:00 a.m. – 1:00 p.m.)**

Attend *Elizabeth Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 22 at Union County College in Elizabeth, N.J. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

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## New York

**October 1, 2011 (8:00 a.m. — 5:30 p.m.)**

With support from New York University's School of Continuing and Professional Studies and our media sponsors (Forbes, Time Moneyland and Mint.com), the Financial Planning Association of New York presents its annual, day-long Financial Fitness Workshop for the public on October 1 at the NYU School of Law. FPA members and keynote speakers will share their collective knowledge, wisdom and experience with upscale residents in the Greater Metropolitan New York area who are motivated to learn more about the financial planning process.

In a time of widespread financial mistrust, emphasized by Bernie Madoff swindling thousands out their money, individual investors always must be on the look-out for fraudulent financial

hucksters. Tom Ajamie will deliver the lunchtime keynote address. Ajamie has recovered hundreds of millions of dollars from scamming individuals, corporations, and organized criminal organizations and is co-author of *Financial Serial Killers: Inside the World of Wall Street Money Hustlers, Swindlers, and Con Men*, a guide for investors to identify the warning signs and strategies that perpetrators of fraud use to dupe average Americans. The morning speaker will be Simon Arrata, Vice President of Fidelity Investment Insitutional Services, who will give a "Perspective on the Market." Other session topics include: DIY Guide: Creating A Financial Plan; Constructing Your Portfolio; Alternative Investments: Hedge Funds, Commodities, REITs; Making the Most Out Of Less: Smart Planning Techniques; Paying Yourself In Retirement; Creating Income Streams: Stocks, Bonds, Preferreds & Cash; Wills, Living Wills, Healthcare Proxies, POLTs; Insurance Needs: Life, Property, Casualty, Elder Care; Credit Scores, Credit Repair & Identity Theft. To register, please visit www.fpany.org. Space is limited and reservations are required. Net proceeds from this event will support Project Renewal, a NY based charity.

**October 6, 2011 (12:00 – 7:00 p.m.)**
The Financial Planning Association of New York will host “Financial Planning Day” at the New York Public Library on October 6 in New York, N.Y. Free one-on-one financial counseling with Certified Financial Planners will be available to the public. Workshops include investing, retirement planning and finding an advisor.

## North Carolina

**October 3-7, 2011**
The Financial Planning Association of Charlotte and the Financial Planning Association of the Triangle will partner with the North Carolina Department of State Treasurer to rollout complimentary financial planning services to employees of Corinth-Holders High School, a member of the Teachers and State Employees Retirement System. More than 65 individuals attended the initial informational meeting. During Financial Planning Week the emphasis is to have participants log on to Money 101, a powerful tool and resource to assess their financial situation and provide a personalized plan. They will use information from Money 101 to work with assigned financial planners in a one-on-one relationship.

**October 3, 2011 (6:30 – 7:30 p.m.)**
The Financial Planning Association of Charlotte will host a seminar, “Planning for the Future,” on October 3 at various housing developments in Charlotte, N.C. These sessions are part of a series of presentations being offered to clients of local community organizations in the Charlotte area. The Charlotte Housing Authority's mission is to lead, develop, and execute community-wide strategies that meet the broad range of housing needs for families that cannot otherwise attain conventional housing. These sessions focus on financial literacy and educating individuals about the importance of financial education and planning for the future.

**October 5, 2011 (6:30 – 7:30 p.m.)**
The Financial Planning Association of Charlotte will host a seminar, “Planning for the Future,” on October 5 at various housing developments in Charlotte, N.C. These sessions are part of a series of presentations being offered to clients of local community organizations in the Charlotte area. The Charlotte Housing Authority's mission is to lead, develop, and execute community-wide strategies that meet the broad range of housing needs for families that cannot otherwise attain conventional housing. These sessions focus on financial literacy and educating individuals about the importance of financial education and planning for the future.

**October 7, 2011 (10:00 a.m. – 12:00 p.m.)**
The Financial Planning Association of Charlotte will host a seminar, “Basic Budgeting & Investing,” on October 7 at the Urban League of Central Carolinas in Charlotte, N.C. This is one of a series of presentations being offered to clients of local community based organizations in the Charlotte, NC area. These sessions focus on financial literacy and educating individuals about the importance of financial education and financial planning.

## Ohio

**October 8, 2011 (10:00 a.m. – 2:00 p.m.)**

Attend *Columbus Planning Day* to get free, no strings attached financial advice from professional financial planners on October 8 at Columbus Metropolitan Library in Columbus, Ohio. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Columbus Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Columbus Planning Day* is available at www.FinancialPlanningDays.org/Columbus or by calling 877-861-7826. Walk-ins are also welcome.

## Oregon

**October 22, 2011 (9:00 a.m. – 4:00 p.m.)**

Attend *Eugene Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 22 at Willamette High School in Eugene, Ore. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

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**October 22, 2011 (10:00 a.m. – 4:00 p.m.)**

Attend *Portland Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 22 at the Doubletree Hotel in Portland, Ore. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

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## Pennsylvania

**October 1, 2011 (10:30 a.m. – 3:30 p.m.)**

Attend *Philadelphia Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 1 at Ben Franklin High School in Philadelphia, Pa. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

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## Texas

**October 1, 2011 (10:00 a.m. – 12:00 p.m.)**

Attend *Houston Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 1 at the Berry Center in Cypress, TX. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Houston Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Houston Financial Planning Day* is available at www.FinancialPlanningDays.org/Houston or by calling 877-861-7826. Walk-ins are also welcome.

**October 9, 2011 (12:00 – 4:00 p.m.)**

The Financial Planning Association of Dallas/Ft. Worth will participate in the Dallas Morning News "Ask a CFP® Hotline" on October 9. The hotline will be staffed by local FPA chapter members. This event includes both phone calls and online questions from the public.

**October 22, 2011 (1:00 p.m. – 4:00 p.m.)**

Attend *San Antonio Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 22 at the George Gervin Academy in San Antonio, TX. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*San Antonio Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide

free financial education and programming to communities throughout the U.S. Free online registration for the *San Antonio Financial Planning Day* is available at www.FinancialPlanningDays.org/SanAntonio or by calling 877-861-7826. Walk-ins are also welcome.

## Utah

**October 2011**

In conjunction with the Financial Planning Association of New York's Moneywise program, the Financial Planning Association of Utah has obtained a grant to provide a series of Financial Literacy courses to survivors of domestic abuse through the YWCA and Family Justice Center in Salt Lake City, Utah. Utah's governor, Gary Herbert will issue a proclamation declaring Financial Planning Week and local FPA members are volunteering their time to teach the courses and act as individual counselors as need. The FPA Student Chapter at the University of Utah will also provide volunteers to work with clients and senior advisers in developing individual client plans.

## Virginia

**October 22, 2011 (9:00 a.m. – 3:00 p.m.)**

Attend *Virginia Beach Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 22 at the Virginia Beach Convention Center in Virginia Beach, Va. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

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## Washington

**October 22, 2011 (10:00 a.m. – 2:00 p.m.)**

Attend *Seattle Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 22 at the White Center Heights Elementary School in Seattle, Wash. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

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## Washington, DC

**October 15, 2011 (10:30 a.m. – 4:00 p.m.)**

Attend *Metro Washington Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 15 at the Columbia Heights Educational Campus in Washington, D.C. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

*Metro Washington Financial Planning Day* is part of a national Financial Planning Days initiative created by Certified Financial Planner Board of Standards, Financial Planning Association, Foundation for Financial Planning and the U.S. Conference of Mayors. The collaboration is an effort involving city governments and thousands of financial planners nationwide united in an effort to provide free financial education and programming to communities throughout the U.S. Free online registration for the *Metro Washington Financial Planning Day* is available at www.FinancialPlanningDays.org/MetroWashington or by calling 877-861-7826. Walk-ins are also welcome.

## Wisconsin

**October 22, 2011 (10:00 a.m. – 4:00 p.m.)**

Attend *Green Bay Financial Planning Day* to get free, no strings attached financial advice from professional financial planners on October 22 at the Joan Kroc Corps Community Center in Green Bay, Wis. The event will feature planners from the Financial Planning Association® and CERTIFIED FINANCIAL PLANNER™ professionals, all volunteering their time and expertise to work with local residents one-on-one to address important financial issues such as budgeting, getting out of debt, income taxes, home foreclosures, paying for college, estate planning, insurance, and much more. Educational workshops will also be offered on key personal finance topics.

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# 2011 Financial Planning Week Proclamations

The states of Florida, Kansas, Minnesota, New York, Pennsylvania and Texas declared the week of October 3 in 2011 Financial Planning Week.

*The following cities declared the week of October 3 in 2011 Financial Planning Week:*

**Kansas**
Topeka

**Minnesota**
Burnsville
Cloquet
Columbia Heights
East Grand Forks
Erskine
Minneapolis
Moorhead
Plymouth

**New York**
New York

**Pennsylvania**
Philadelphia

**Texas**
Addison
Austin
Dallas
Denton
McKinney
Plano

*The following counties declared the week of October 3 in 2011 Financial Planning Week:*

**New York**
Manhattan

**Pennsylvania**
Philadelphia