



FINANCIAL
PLANNING
ASSOCIATION
NORTHEAST OHIO

FPA NEO NEWSLETTER

News from the Financial Planning Association of Northeast Ohio

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President's Message

by Kayla Stowe, CFP®, CRPC®



It's hard to believe we are quickly approaching the midpoint of 2024! We hope that you all enjoyed the array of topics we covered in our monthly breakfast meetings in the first half of the year and that you were able to connect

with our partners in a meaningful and productive way. As we head into the second half of 2024, the FPA Northeast Ohio Chapter Board is working to continue to build on additional networking and educational opportunities.

A few highlights still to come include:

- Our **summer webinar series kicks off June 20th** with a presentation about the major changes to the college process in 2024. On July 18th our programming will provide an update on the municipal bond market and our final webinar of the summer will on August 15th.
- We will offer **free virtual ethics for members** with Dan Candura on September 12th.
- Our **annual summer social will take place on July 25th** at Merwin's Wharf.
- The **FPA Annual Conference 2024 is coming to Columbus, Ohio!** The conference will take place September 18-20, 2024 at the Greater Columbus Convention Center. **Ohio members get an additional \$100 off their registration pricing. Early bird registration closes June 24 so be sure to take advantage of all savings and register today!**
- We will bring back our **Career Path Panel** for a second year, providing the opportunity to engage with young professionals as well as financial planning students from John Carroll and the University of Akron this fall.

As always, the FPA Board is here to serve as your local advocate and to ensure that we are providing the most valuable and worthwhile experience for our chapter members. Please do not hesitate to reach out to any board members with feedback so that we can continue to provide enriching programming and valuable networking opportunities. We look forward to seeing you at our upcoming events!

Advocacy Update

by Tyler M. Colton, CPA/PFS, CFP®



As the new Advocacy Director for the FPA Northeast Ohio Chapter Board since the start of the year, an introduction is long overdue. I am a Senior Financial Planner with Clearstead and have been in the industry for more than three years. I previously worked in accounting and college athletics for several years before making the change. I am originally from West Virginia (Let's go Mountaineers!) but have made the area my home since 2017.

A significant part of this role is working with state and local representatives and regulators to enact legislation aimed at addressing financial literacy in schools, title protection for financial planners, and other initiatives to improve the financial wellbeing of all consumers. To complement this effort, we are currently planning the return of the FPA Ohio Advocacy Day in 2025. This is tentatively scheduled to take place Wednesday, April 30, immediately following the next [FPA All-Ohio Symposium](#) happening April 28-29, 2025 in Columbus.

There is also an earlier opportunity to help on the advocacy front. FPA is currently seeking volunteers interested in increasing our engagement with federal legislators and staff. We're looking to hold virtual meetings in June/July with our Congressional Representatives and/or Senators to discuss the following legislation: [S. 722](#) (Freedom to Invest in Tomorrow's Workforce Act), [HR 6327](#) (Youth Financial Learning Act), and [HR 8126](#) (amend the Financial Literacy and Education Improvement Act).

If you're interested in supporting either (or both) of these initiatives and would like to meet with your local representatives and state regulators, then please contact me at tcolton@clearstead.com. I look forward to collaborating with our members on these issues and all the great things we have planned for the rest of 2024 and 2025!

2024 Board of Directors

Kayla Stowe, CFP®, CRPC®, *President*

Lauren Lippert, CPA, CFP®, *President Elect*

Robert Casarona, CFP®, MS, AWMA®, *Chair, Past President, Treasurer*

Kurt M. Thomas, CFP®, *Secretary*

Scott Brihn, *Pro Bono Director*

Tyler M. Colton, CPA/PFS, CFP®, *Advocacy Director*

Mac McLaughlin, CFP®, *Partnership Director*

Kimberly Murphy, CFP®, *Director*

Jim Perrine, CFP®, *Membership Director*

Alexander Rupert, CFP®, *Director*

Jacob Smail, CFP®, *NexGen Director*

JUNE 2024

FPA ANNUAL CONFERENCE 2024



Sept. 18 - 20
fpaannual.org

REGISTER NOW

AGENDA &
SPEAKERS
NOW AVAILABLE!
[VIEW HERE](#)

**EARLY BIRD
DISCOUNT**



**Expires
June 24**

Membership and Events Update

by Jim Perrine, CFP®



I hope everyone had a good spring and is getting ready for summer! Thank you to those who joined us at the joint social event last month at the Wild Eagle. The location was perfect for the 75 individuals who attended. Our next social event will be at Merwin's Wharf on Thursday, July 25. We will also have a happy hour in the fall with the location TBD.

If you have any prospective new members, please feel free to contact me at jim.perrine@mai.capital. I'd also be glad to reach out and invite them to future events so that they can experience our dynamic group.

As a reminder, you can auto renew your FPA membership. This will provide you with a 10% discount.

We hope to see you at Merwin's Wharf next month!

NexGen Update

by Jake Smail CFP®



The summer is heating up and the Guardians are in first place in the division. That means the FPA NexGen Guardians game is right around the corner! You can now [buy your ticket](#) for the game against the Baltimore Orioles on August 1st. In addition to that, we are starting to plan for this year's Career Paths Panel later this year. Stay tuned for more information on that soon. We would love for there to be experienced FPA members at the event this year to answer questions that the NexGen attendees may have. Non 'NexGen' attendance is encouraged!

Our chapter recently gave out scholarships for two NexGen members to attend FPA NexGen Gathering later this year in Phoenix. Congratulations to Daniel Francy (Clearstead) and Ryan Koler (Koler Financial Group). There were some very impressive candidates that applied, which I think says a lot about the qualified young financial planners in the area. We're excited to hear about the experience the scholarship recipients had at NexGen Gathering and what information they can bring back to their employers.

SAVE THE DATE!
ALL-OHIOSYMPIOSIUM
APRIL 28-29, 2025
COLUMBUS, OH



2024 Calendar - Details & Registration [HERE](#)

<p>June 20, 2024 Summer Webinar 1</p>	<p>Major Changes to the College Process in 2024 Cozy Wittman, College Inside Track 12:30-1:30 pm Zoom</p>
<p>July 18, 2024 Summer Webinar 2</p>	<p>Market Update 11:00am-12:00 pm Zoom</p>
<p>July 25, 2024 Social</p>	<p>5:00-7:00pm Merwin's Wharf</p>
<p>August 1, 2024 NexGen Guardians Game</p>	<p>7:10pm Progressive Field</p>
<p>August 15, 2024 Summer Webinar 3</p>	<p>12:30-1:30 pm Zoom</p>
<p>September 12, 2024 Virtual Ethics</p>	<p>12:00-2:00pm Go To Webinar</p>
	
<p>October 17, 2024 Education Program</p>	<p>7:45-10:30 am TBD, Independence, OH</p>
<p>November 7, 2024 Education Program</p>	<p>Date and Time TBD</p>

FPA NEO WEBSITE DID YOU KNOW?

Past Event Materials are available [HERE](#)

Post/View Job Opportunities and/or Resumes [HERE](#)

Thank you to our 2024 Partners!

GOLD PARTNERS



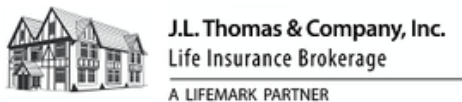
SEEKING A BETTER WAY TO DIVERSIFY



SILVER PARTNERS



From Capital Group



A LIFEMARK PARTNER



ARE YOU INTERSTED IN BECOMING A PARTNER IN 2024?
Information can be found online [here](#).



Take 5

An update on the programs and services that make FPA *your partner in planning*™



June 2024



Unlock Your Potential at the FPA Annual Conference 2024

Get ready to transform your business and ignite your passion for growth at [FPA Annual Conference 2024](#)! Registration is now open for this must-attend event, designed to elevate your skills and expand your network. Join a dynamic community of like-minded professionals, learn from industry trailblazers, and immerse yourself in innovative ideas and strategies. Connect with some of the brightest minds in the field, share your experiences, and discover new ways to drive your success. This exclusive event is crafted just for you—don't let it pass you by. [Grab your spot today and enjoy early bird pricing.](#) Mark your calendar for September 18–20 in Columbus, Ohio, and get ready for an unforgettable experience!



You Won't Want to Miss FPA NexGen Gathering 2024!

As the premier event designed specifically for newer professionals like you, join us in sunny Phoenix, from August 20–22 for [FPA NexGen Gathering 2024](#). It's the perfect opportunity for those entering or within their first eight years in the profession. You'll be able to engage in enlightening conversations that will expand your knowledge, sharpen your skills, and fuel your passion for financial planning. [Early bird pricing is available until May 31!](#)

The 2023 FPA Annual Report

Over the past year, FPA leaders and staff worked hard to make the Association your partner in planning through Practice Support, Learning, Advocacy, and Networking. Learn about those efforts and the many programs, services, and events that are driving the value of membership in the recently released 2023 FPA Annual Report. The report looks at how FPA works for you and includes an update on membership and the 2023 audited financial statements. [Read the 2023 FPA Annual Report now.](#)

The June Journal of Financial Planning Is Now Available

FPA Members can now read the June 2024 issue of the *Journal of Financial Planning* to learn about the value of designations, creating a better stakeholder experience, sustainability in real estate investing, incorporating ESG, working with widows, a process for automating your practice, optimal retirement glide paths, the latest annual Trends in Investing survey results, and much more. Access the latest issue of the [Journal now.](#)



Take 5

June 2024

Where Are Financial Planners Investing Now? This Report Lets You Know.

Discover the latest insights from the 2024 Trends in Investing survey conducted by FPA and the *Journal of Financial Planning*. Dive into the investment preferences of over 200 financial professionals as they navigate the increasingly dynamic investment landscape. Explore the survey's findings on investment preferences, life insurance, economic outlook, and much more. [Download the 2024 Trends in Investing report now!](#)

FPA Insurance Programs: Protecting You and Your Business

As your partner in planning, FPA wants to help you protect your business and employees through various insurance programs exclusively offered to our valued members. Learn about the full menu of programs available to you, including Group Medical Plans, Group Long-Term Disability, Group Short-Term Disability, Group Term Life and Accidental Death and Dismemberment, Group Vision, Group Dental, Business Overhead Expense, Errors and Omissions Insurance, Cyber Liability and Data Breach Insurance, Investment Advisor Surety Bond, among others. All FPA insurance programs are offered through Ryan Insurance Strategy Consultants, one of the profession's leading providers of insurance services. [Learn more.](#)

Join the Community: Connect with Your Peers on the All-New FPA Connect

Looking to connect with other financial planners and FPA members from around the world? Look no further than the all-new FPA Connect platform! With a sleek homepage featuring an activity feed, it's now easier than ever to stay up-to-date with the latest discussions and news. Plus, the improved community library makes it a breeze to navigate and find the information you need when you need it. Best of all, access to this valuable resource is just one of the many benefits of FPA membership. So why wait? [Start connecting today!](#)



**Support the Advancement
of Your Profession**

The [FPA Political Action Committee \(FPA PAC\)](#), the only PAC focused on advancing the financial planning profession, provides an important seat at the table, forges relationships with lawmakers and their staffs, and provides an opportunity to share the financial planning story. There is much work to do and every dollar counts. To help us fight for your profession, we ask you to make a contribution to support your FPA PAC. Whether you contribute \$50 or \$5,000, every dollar is appreciated and will support advocacy efforts that move your profession forward.

DONATE TODAY!

