



FINANCIAL
PLANNING
ASSOCIATION
NORTHEAST OHIO

FPA NEO NEWSLETTER

News from the Financial Planning Association of Northeast Ohio

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VIA SEPT. TAKE 5

President's Message

by Kayla Stowe, CFP®, CRPC®



I hope that everybody had a great summer! Although we break from our monthly breakfast meetings June through September, I hope many of you found value in our summer webinar series and summer happy

hour networking opportunities. As we head into the final few months of 2024, we look forward to seeing everybody back at our monthly meetings providing additional CE, networking and opportunities to connect with our partners.

A few highlights still to come for 2024:

- Career Paths for Financial Planners and Networking will return for a second year on October 3rd, providing the opportunity to engage with young professionals as well as financial planning students from John Carroll and the University of Akron.
- Our final Educational Meeting on November 21, which will take place at The Cleveland Foundation offices.

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.

REGISTRATION IS OPEN!

**ALL-OHIO SYMPOSIUM
APRIL 28-29, 2025
COLUMBUS, OH**



VIEW REMAINING EVENTS ONLINE HERE

Advocacy Update

by Tyler M. Colton, CPA/PFS, CFP®



What is advocacy? I get asked this question every time I mention my role as the Advocacy Director for FPA of Northeast Ohio. Many people associate advocacy with government relations. While that is certainly a significant part of advocacy, it is not the only area in which advocacy is concerned. Put simply, my role is to help members be advocates for financial planning. This is accomplished in three ways outlined below with relevant examples.

1. FPA of Northeast Ohio actively engages state lawmakers to provide members with an impactful voice on the policies that can impact the members, their businesses, and clients.
 - FPA Ohio Advocacy Day – Wednesday, April 30, 2025 following the [FPA All-Ohio Symposium](#).
2. FPA of Northeast Ohio embraces diversity in financial planning by partnering with allied organizations and bringing diversity to its leadership.
 - Promote diversity in the profession through local alliances, including [Diversitas](#).
3. FPA of Northeast Ohio positions members to have an impact in the community while leveraging financial planning for good.
 - Work with local universities to build awareness of financial planning as a career path.
 - Actively work with [Junior Achievement](#) and other similar organizations to teach financial literacy classes to students.
 - Engage with local and national [pro bono programs](#).

If you or anyone you work with is interested in being an advocate for financial planning, I suggest checking out [FPA's Advocacy Center](#) for more information. This is your hub for getting involved in policy advocacy, pro bono programs, and more. I am always available to be a helpful resource as well, so please don't hesitate to get in touch.

2024 Board of Directors

Kayla Stowe, CFP®, CRPC®, President

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

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Thank you to our 2024 Partners!

GOLD PARTNERS



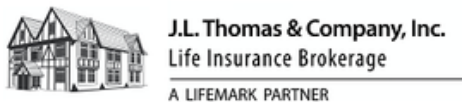
SEEKING A BETTER WAY TO DIVERSIFY



SILVER PARTNERS



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ARE YOU INTERSTED IN BECOMING A PARTNER IN 2025?
Information can be found online [here](#).



Take 5

September 2024

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



The FPA NexGen Development Pathway: Paving the Way for Your Career

The financial planning profession can be overwhelming for newcomers looking to make it their calling. Fortunately, the FPA NexGen Development Pathway was created to provide guidance, empowerment, and resources for next-generation financial planners like you. Encompassing five phases (Discover, Prepare, Launch, Elevate, and Impact), each phase offers a clear structure, knowledge, and recommended resources for your personal and professional growth – no matter the phase you're in. [Get started!](#)

Enjoy Complimentary Access To TIFIN Wealth with Your FPA Membership

We are thrilled to share our partnership with TIFIN Wealth, which aims to support the growth of independent financial planners. As part of this collaboration, FPA members who manage under \$100M in AUM can access TIFIN's personalized investment platform at no cost. This benefit is intended to provide FPA members with advanced tools and resources to better serve their clients, while also making innovative investment technology more widely available. [Learn more.](#)

Connect with Your Community Through FPA Knowledge Circles

Like all financial planners, you have specific interests that are significant to you personally and professionally. As your partner in planning, FPA provides opportunities to drive those interests. Through FPA Knowledge Circles, you and other FPA members can coalesce around shared interests and connect globally with peers. These vibrant communities offer you an opportunity to engage in discussion, hear from experts, and build valuable connections. With 15 unique communities on planning-focused or community-based topics and issues, there is a Knowledge Circle for you. [Learn more!](#)

The September *Journal of Financial Planning* Is Now Available

FPA Members can now read the September 2024 issue of the *Journal of Financial Planning* to learn about assisting clients with LTC concerns, strategies to fuel your business growth, the three phases of family caregiving, beating business development anxiety, advising women in retirement, finding joy in operational excellence, the politics of bitcoin, and much more. Access the latest issue of the [Journal now.](#)



Take 5

September 2024

Build Your Awareness with FPA MediaSource

FPA MediaSource has sent more than 8,200 journalist queries to FPA members over the past six years. That's a lot of media attention for those members, so don't miss out. To get started, simply take the on-demand Media Mastery 2.0 media training available through FPA. Access the training on-demand whenever you're ready. Once the session is concluded, you will be invited to join FPA MediaSource so you can start to get the journalist queries in your inbox every day! [Take the training now to get started!](#)

Take Your Business and Career to the Next Level with Carson Coaching

As the official coaching partner of FPA, Carson Coaching is providing several exciting opportunities for FPA members to positively impact themselves and their businesses. Members can now access Carson's online coaching center, monthly group coaching, discounts to attend many Carson programs, and much more. [Learn more about all that is now available to you as an FPA member.](#)

FPA Is Your One-Stop-Shop for All Your Learning Needs

Staying razor-sharp on financial planning trends and practices makes you a competent financial planner. While you can get various education from across the financial services industry, nothing compares to the breadth and depth of education you get through the FPA Learning Center. FPA is constantly developing live and on-demand webinars, certificate programs, partner programs, special interest programs, and more to help our valued members stay on top of all they need to know as financial planners. There is a ton of CE to satisfy CFP® CE requirements, and many programs are complimentary – or discounted – with membership. [Check out the FPA Learning Center!](#)



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!

