



THE FINANCIAL PLANNING ASSOCIATION

News about your chapter and its members

December 2005

PRESIDENT'S MESSAGE... Kenn Tkatch, ChFC

As you may have heard, your chapter was recognized at FPA's 2005 Leadership Conference in Denver for attaining The Gold Level of Achievement in FPA's Chapter Recognition Program. I hope all members will join the board and administration in a round of applause for all of us! This is the first time the chapter has reached the highest level of recognition since the merger between IAFP and ICFP back in 2000. It is an honor and joy to be president of a board that shares a level of enthusiasm and commitment to serving the local financial planning practitioner community. This award is really a culmination of hard work by all past boards under the leadership of people like Jess Hurst, Ed Knudra and Michael Koler. It is the outcome of hard work and volunteerism by your colleagues and associates that has brought this honor to the Northeast Ohio planning community. Like the Rose Bowl parade, we too are already planning for 2006. It will be a challenge to maintain and improve your chapter in the coming months but plans are being formulated to do just that.

Our fall symposium was a giant success with over 300 attendees, partners and student volunteers. As we plan for 2006, we need more members to step forward and donate a little time and effort in helping out a committee or assisting a committee chairperson in some way. You don't need to become a full-fledge board member right away, but we would love to put you on a list!

As 2006 comes upon us, the effects of globalization, technological change, low-cost competition and deregulation is starting to hit our geographic area. Surely there will be unique and challenging opportunities for our members and associates to help the public community during the coming months. Hopefully, you will continue to look to the Northeast Ohio chapter for educational and networking links to see you and your clients through these challenges.

Thank you for your support during 2005 and congratulations for belonging to a successful chapter!!!

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- Changes taking place.....
- **January 19, 2006 Program "Family Business Misstakes" presented by**

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As we move into a new year, we will be sending the FPA/NEO newsletter to you in an electronic format. By changing the way members receive their newsletter enables us to include more information, longer articles, more photos, advertising, use all the color we want and save money. Costs to print and mail have gone up considerably in the last year. We have been mailing approximately 800 newsletters to members and prospective members on a mostly monthly

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President
National Center for Family Business
2 CEs for CFP/CPAs applied for

Program location: Lockkeepers
8001 Rockside Road
Valley View, OH

8 a.m. Registration/breakfast
8:15 a.m. Announcements/program
11 a.m. Adjourn

- Board nominates Mark McCandless to director position
- Partnership Packages have been mailed out.

January 19, 2006 Program
"Family Business Misstakes"
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"FAMILY BUSINESS MISSTAKES" Mr. Warrum will examine in detail the most common mistakes made by family businesses and many of their solutions. This will include areas such as succession, communication, conflict resolution, business processes, and fairness and equality issues found in most family businesses. If you are a family business or work with one this seminar is a must!

LEARN:

- Why less than 13% of all family businesses make it successfully past the 3rd generation?
- Why do families have trouble communicating within a family business?
- How can we resolve and avoid conflict in a family business?
- Why are we always putting out fires and reacting to problems?
- What are the most common mistakes of family owned businesses?
- How do you hold people accountable?

basis.

We welcome ideas on what type of information you would like to see in this publication. Members will be invited to write columns on current topics of interest. Speakers and sponsors will have an opportunity to include articles on current topics or products. We will feature our new members. The board of directors and committee chairs will be listed. We invite members to take a look at the committees and pitch in and work on a committee to take our chapter to a higher level.

Roger J. Warrum is President of the National Center for Family Business, which is the largest multi-service family business center designed exclusively for family owned businesses and their advisors. He is the

Deadline for registration is January 16th.
Cost to attend: \$35 FPA Members / \$60 Nonmembers
Yes, I would like to attend the January 19th program.

___ I am an FPA Member, ___ I am not a member

Name: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____

E-mail address: _____

Please mail check with registration form to:

FPA/NEO

28022 Osborn Road

Bay Village, OH 44140

If you would like to pay with a credit card, please go to
www.mollyguard.com/event/22341825

Board nominates Mark McCandless to director position

Mark McCandless will be voted on to begin serving on the board of directors for the Financial Planning Association, North East Ohio Chapter at the January 19th program meeting.

If you are interested in serving on a committee, please call Lynn Bracic at the FPA/NEO office at 4440.899-5055.

Partnership Packages have been mailed out.

As 2005 draws to a close the Northeast Ohio Chapter of the Financial Planning Association would like to again thank our sponsors for their generous support this past year. Partnership with the chapter has enabled us to reach more financial service professionals in the northeast Ohio area than ever before. Without participation in our October Symposium the chapter would not have been able to successfully provide the national caliber event we did for over 300 local financial service professionals.

That event along with our monthly programming, our annual CFP ethics meeting and various other chapter sponsored events allowed us to strengthen our chapter and chapter sponsored events going

originator of *Family Business Journal*, which is a nationally distributed magazine dealing with issues that concern family business owners.

He is author of *Family Business Mistakes*, which is a book concerning common problems faced by family owned businesses and his newest book, *How to Succeed in Family Business**

**without really crying...* Mr.

Warrum has over twenty-five years of experience working with family owned businesses. He is the originator of the annual Family Business Retreat and is one of the first 100 individuals to graduate from the American College's Family Business Specialist Program.

Join our mailing list!

forward.

With 2006 in sight we are strategically reaching out to our most successful partners. We have revamped our three levels of chapter partnership to make it more appealing, more worthwhile and more advantageous for all of our partners. Our aim with the new format is to provide more exposure and more contact with members and prospective members at all levels. For more information on the different levels, contact Lynn Bracic at the FPA/NEO office at 440.899-5055.

email: fpaneo@aol.com
phone: 440.899-5055
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