



ONE CONNECTION™

The premier community that develops and supports financial planning professionals

What's Going on with *Your* FPA of Maryland June 2014

Our 2014 Partners

Baltimore Community Foundation
- Rebecca Rothey

Calvert Funds
- Tacy Roby

Charles Schwab Advisor Services
- Martin Bucko
- Ray Harris

Fidelity Investments
- Katherine Forester

Founders Financial
- Jim DeCarlo

Pessin Katz Law
- Kevin Bress

Revenue Shares
- David Cohen

The Johns Hopkins Carey Business School
- Pam Williams

The Kitces Report
- Michael Kitces

T. Rowe Price
- Barrett Wragg

Wilmington Trust Funds

A Call for Board Member Nominations

Dear Fellow FPA of Maryland Members,

You are part of an organization of professionals dedicated to the financial planning profession and dedicated to providing the highest quality advice to clients.

Members of this organization reach every corner of our state. Chapter leaders advocate to state and national representatives on behalf of the organization and the industry, driving real change in our state as we did this year with the Estate Tax legislation. Additionally, board directors guide the future growth of our profession and the FPA of Maryland.

Have you thought about applying your passion for this profession and industry experience to serve in 2015 as an FPA of Maryland Board Director?

Your board is the driving force behind FPA in the state of Maryland. We are a group of dedicated, involved members just like you who have stepped into a leadership role for the betterment of our profession and financial planning in our state. We recognize the impact our efforts today can have on our members and their practices in years to come.

- Joe Mondell



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Board membership is an opportunity to stay current in an ever-changing industry. We drive chapter programming, steer membership benefits, advocate on behalf of our profession, represent our organization outside our industry and foster connections among members within Maryland and across the nation. This is an opportunity to give back; to share your knowledge and experience with the goal of enhancing the financial planning profession in our state.

Consider joining the team and being part of the continued growth and success of our chapter! Submit your name or nominate a colleague for 2015 FPA of Maryland board membership today! Please contact Lyn Phelps with your nominations at chapteradmin@fpamd.org. The deadline for nominations is Monday, June 30th, 2014.

Sincerely,

Susan M. Mitcheltree, CFP®
President-Elect, FPA of Maryland

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