*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**

## Only 2 weeks remain to take advantage of the member only pre-sale price

## Fall Symposium

September 11 & 12
Turf Valley Resort & Conference Center
Ellicott City, Maryland

**Please click here to view the invitation and to register.**

**Pre-sale tickets available to FPA Maryland Members ONLY through Wednesday, July 2: $295**
**Member rate after July 2: $349**
**Non-Member rate: $399**

**KEYNOTE ADDRESS**

***Strategic Power: Systematically Influencing People and Their Decisions***
*presented by Jeff Cochran, Master Facilitator from the internationally acclaimed Shapiro Negotiations Institute*

This program is designed to help participants influence others and the decisions they make.

In many cases, people try to get things done without understanding the other individuals involved in the process, their motivations and needs, and how they make decisions. Examples include: Pharmaceutical reps trying to convince a doctor to prescribe their product; Marketing reps attempting to persuade their Finance department to include a certain

**- Joe Mondell**

View our profile on LinkedIn

Follow us on twitter

program in the budget; Financial advisors motivating clients to make a specific investment; and Government agencies jockeying to secure political support for an initiative.

When attempting to influence others, people must understand the four basic components that affect their own credibility and ability to impact decisions. There is a cliché: "People like to work with people they know and trust." The ultimate success in creating or rebuilding that type of business relationship rests in implementing a systematic framework to achieve one's influencing objectives.

Participants first receive an Influencing Inventory tool to help them build more logical arguments based on circumstance and comfort level. Next, they must understand the positive and negative emotions that impact decisions and drive the other side's interests. Finally, logical persuasion strategy is used to stimulate action and not just agreement. By utilizing this proven process, participants can effectively manage their time, talent, and tactical efforts with increased precision and success.

**The two-day symposium will also include:**

**Michael Kitces**, Director of Planning Research with Pinnacle Advisory Group
**Alan Levinson**, Chief Economist with T. Rowe Price
**Ben Lewis**, Director of Communications and Public Relations for Financial Planning Association
**Vince Lowry**, CEO of Revenue Shares

**PLUS**

**Dan Candura** presents CFP® Ethics

**AND**

**Jim DeCarlo,** of Founders Financial moderates a 90-Minute Practice Management Panel Featuring:
**David Berman**, CFP®, CLU, CEO of Berman McAleer
**Peter McGratty**, CFA, Vice President of Strategic Partnerships for Pinnacle Advisor Solutions
**Chris Benson**, CPA/PFS, Second Generation "NexGen" Advisor with LK Benson & Company

**ALONG WITH**

**Nicole Windsor**, Esq. from Bowie and Jensen Presents *Employment Law Updates*
**Kevin Bress**, Esq. from Pessin Katz Law Presents *Federal and Maryland Estate Planning Updates*
**Brad Breeding**, CFP® from LifeSite Logics Presents

*The Retirement Living Landscape: What You Need to Know and Why*
**Rebecca Rothey**, CFRE from the Baltimore Community Foundation Presents *Philanthropoly: The Fast Paced Property Giving Game*
**Calvert Funds** Presents *The Case for Investing in Water*
**Wilmington Funds** Presents *Alternative Non-Traditional Investments*

## ACCOMODATIONS

Full Breakfast and Lunch Both Days
Mid-Morning and Afternoon Snacks
Overnight Accommodations Available at Discounted Rates
Continuing Education Credits for CFP®, Insurance, CPA, CIMA®, and CPWA® for some sessions