



OF MARYLAND

*The premier community that  
develops and supports  
financial planning professionals*

## What's Going on with *Your* FPA of Maryland May 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  
- Joe Mondell

### Junior Achievement Personal Finance Experience

Help students make informed decisions  
about personal finance!

### JA Personal Finance Experience Volunteer

Friday, June 6<sup>th</sup>

12:45pm - 2:20 pm

River Hill High School  
12101 Clarksville Pike  
(Rte 1085)

Clarksville, MD 21029

FPA of MD volunteers will visit River Hill High School to assist in a simulation in which students will learn to make informed decisions about personal finance as it relates to an assigned life situation.

If you are interested in volunteering, please contact our Volunteer Coordinator for Financial Education, Amanda Campbell, at [acampbell@swealth.com](mailto:acampbell@swealth.com) or 410-988-9494.



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**September 11-12th**

## **FPA of Maryland Symposium**

Registration will open on June 4th. Mark your calendar now - this event will sell out!

Information about speakers and presentations will be out soon.

## **FPA Media Training Webinar**

FPA is hosting another all-member virtual media training on **June 5th, 4:00 - 5:30 pm.** FPA members who are CFP® professionals and attend this media training program can participate in FPA media queries that are sent daily. Each 90-minute media training program, conducted by FPA Director of Communications Ben Lewis, will cover

- How to pitch story ideas to reporters;
- What you need to do to prepare for interviews;
- How you can improve interview performance;
- The tactics for ensuring you maintain a great reputation with reporters;
- Representing FPA and the organizational messages; and
- Much more!

Not only is media training mandatory for members who want to receive FPA media queries, but the information will enable you to effectively approach media relations within your own business!

[Click here](#) to sign-up for the next scheduled FPA all-member virtual media training and to see a list of future dates. You will receive a confirmation email and login details one week before the training.

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**Spring Scholarship  
and the Winner is...  
Bryan Tracy**



Bryan, a Wealth Planning Associate with PNC, has finished his course work and will sit for the CFP® Board of Standards certificate exam in July. He is active with our chapter as Chair of the Chapter Communications Committee. In the photo above, Bryan is standing beside the display banner that the Chapter Communications Committee ordered for us to use at our events.

Once again, the Education Outreach Committee had a difficult decision as all the applicants were excellent candidates for our \$1000 scholarship.

Congratulations, Bryan!



The scholarship was awarded at our May Seminar where we heard from Shawn Brashears of Kelly & Associates Insurance Group about the Affordable Care Act. The room was full and those in

attendance left with useful information and rave reviews for the seminar. We look forward to seeing YOU at our next event.

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