



Engage with FPA of Wisconsin Join a Committee!

Committees and committee volunteers are very important to the long-term health and viability of our organization, and a great place to develop skills and connections that will further your career. Below is a list of current FPA of Wisconsin committees:

Advocacy

Formerly known as Government Relations, this committee connects with state and local government to promote financial planning and to learn about pending legislation that may affect our members. Members of this committee monitor trends, changes in laws or pending legislation and regulations, as well as compliance issues and shares this information with Chapter members. Help us have a voice in consumer protection and financial issues and to make connections with government leaders.

Contact Michael Koerner, 262.446.8150 or michael.koerner@lpl.com.

Career Development

The focus in this committee is on serving FPA members who are in transition, whether they are entering, developing or expanding their career, or selling a practice. Among the activities and interests of this Committee are scholarship programs, internships, mentoring programs, job and resume listing resources, and business and succession planning. We work with area colleges and universities and provide information about CFP certification. We work closely with our chapter's NexGen group (for those 37 and under) and assist in planning networking activities for members and other financial planning professionals.

Contact Julie Coombs, 262.796.8400 or julie@stormfischer.com.

NexGen

A NexGen member is an FPA member aged 37 or younger. Our committee focuses on early and mid-stage issues and career development. Working with FPA national NexGen staff and members, our committee plans networking and other events for NexGen members, students and other interested persons.

Contact Anthony Perillo, 414.431.9352 or aperillo@wipflihewins.com.

Membership

Development, implementation and evaluation of member retention and recruitment initiatives is the primary role of this committee. Activities include welcoming new members, following up with lapsed members, and communicating benefits and opportunities for engagement to all chapter members in order to increase active participation and resolution of member issues. This committee provides an excellent opportunity to get to know people and improve your networking and strategizing skills.

Contact Andrea Bulen, 262.814.1600 or andrea@shakespearewm.com.

Partners

Help us provide needed financial and other resources for the effective operation of our chapter by assisting in the recruitment and care for Partners and other sponsors. Our dues cover less than 25% of the funds needed to operate our chapter at a basic level. The goal of this committee is to educate members about the value of and need for corporate partners, so that all members support our partners and bring business to them. People

interested in knowing the corporate partner footprint in Wisconsin for networking purposes would find this committee a great experience.

Contact Megan Heintzkill, 920.431.3605 or mheintzkill@nicoletwealth.com

Nick Ziarek, 262.377.0484 or nickz@pjschmidt.com

Pro Bono/Public Awareness/Public Relations

This committee oversees several areas. Through Pro Bono initiatives, we provide volunteer opportunities to members as a means of giving back to our communities. As a committee member, you help determine which opportunities to pursue and promote to our membership, as well as help to plan larger volunteer activities, such as Financial Planning Day/Week, clinics or presentations to existing groups, and Money Smart Week events. This committee also manages our chapter's services to veterans and military groups and individuals. Our Public Relations/Public Awareness efforts cultivate public understanding of financial planning and promote FPA on a local and regional level. This includes training and recruiting members to accept media referrals from FPA National as well as outreach to local media, organizations and public entities in order to share information about the financial planning profession and the work of the FPA of Wisconsin. Additionally, this committee matches trained members with requests for speakers in a variety of settings.

Contact Jeffrey Schouten, 262.236.9400 or jschouten@annexwealth.com,

Kay Knuth, 920.830.2077 or kknuth@knuthflp.com.

Programs

This committee coordinates education programs based on the needs of FPA-WI's membership and the requirements for their continuing education needs. Identification of appropriate and timely topics and speakers, planning of regular member meetings, and initial contacts with presenters are among the tasks performed by committee members. The annual "patio meeting" where current topics and best speakers are brainstormed by chapter leaders is planned and led by the programs committee. The chair of this committee works closely with the executive director to plan and organize education meetings; at this time four half-day meetings are held each year. Free CE Day is hosted by Partners and offers FPA-WI members an opportunity to earn CE and network with a variety of financial professionals. Members have opportunities to network with national and regional experts, become familiar with the cutting edge issues of our industry, and to help shape the education for chapter members and other financial planning professionals.

Contact Aaron Kowal, 262.522.4040 or akowal@kowalinvestmentgroup.com

Mike Smith, 414.427.8660 or mike@cpshorizon.com

Symposium

This committee plans and executes, in concert with the executive director, our annual centerpiece event, the Financial Planning Symposium. If you enjoy exploring cutting edge topics and speakers, and planning social and educational programs, this is a great committee for you. You'll have an opportunity to work in a variety of ways, and to meet lots of great people.

Contact Shannon Nook, 262.785-1377 or shannon@lfgwi.com

Justin Moilanen, 262.510.1530 or justin.moilanen@uwalumni.com

Social Media

If you are interested in social media, this committee is for you. Leading the chapter's efforts in promoting Chapter activities, membership and positive awareness of FPA WI via major social media channels. You'll have the opportunity to post and share chapter-related information and join the conversation to promote greater engagement with members and beyond.

This position is currently vacant.