

FPA 2011 Attendees Grouped Into Networking 'Communities'

By Katie Kuehner-Hebert

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First-time attendees of the FPA Experience 2011 annual conference were eager to learn about new events this year centered around the concept of "communities" -- groups of planners of similar ages or specialties. The communities are meant to help attendees glean the most appropriate information for their practices and to better network with their peers.

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"This year we decided to do something really different and organize the continuing education tracks around smaller communities of interests, depending on where you are in your careers -- young professionals, portfolio managers, retirement planners," says Evelyn Zohlen, task force chair for the Financial Planning Association's annual conference in San Diego this week, and a planner in Huntington Beach, Calif.

"We also realize that really good stuff happens in between sessions, when you're discussing with your peeps, so we created Community Building extra sessions," Zohlen says. "If you thought a particular speaker rocked, check the schedule and chances are that speaker will be holding an intimate conversation with a much smaller group."

Moreover, the opening receptions on Thursday evening will be broken into various sections if attendees want to mingle with others with similar interests, she says. The orientation session also featured a first-time attendee "checklist" on the advice of participants of prior year conferences, says Tricia Rieple, assistant director of membership for the trade group. Priorities include meeting five new people, giving 10 of your business cards away, downloading the FPA Experience 2011 app to your smartphone and coming to the Community Gathering Place in the Exhibit Hall and find out what communities are all about.

First-time attendee Brian Lauzon, a managing principle at AdvisorAssist LLC in Newton Square, Pa., says that the particular community, "Practice Optimization," would be beneficial for him to attend, to network with financial planners who might need his consulting services. "Our goal is to help people build, grow, protect and optimize their practices," Lauzon says.

Hiroyo Hosoda, a planner in Kumagaya Saitama, Japan, says she is hoping to network with other planners at the conference, as only a few planners in Japan have stand-alone practices. The vast majority are employees of banks and insurance companies there. "I want to learn the way financial planners do their business here, so I can use it in my own practice," Hosoda says.

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