

The Financial Planning Association of Central Virginia Inc.
"A Gold Level Chapter"

RES\$OURCE

March 2006

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"Maximizing Client Wealth Through Proper Tax Planning"

Speaker: **Ryan L. Losi, CPA**
Piasek & Associates, P.C.

"Retirement Plan Opportunities for Financial Planners in 2006"

Speaker: **Burl V. Bachman, ASA, EA, MAAA, MSPA**
Retirement Plan Administrative Service, Ltd.

"Index Funds vs. Exchange Traded Funds"

Speakers: **Robert (Chip) W. Brockmeier, CFA, CFP®**
Thomas M. Gates, CFP®
Wachovia Wealth Management

3 CFP, CPA CPE CE Credits Approved
2 Insurance CE Credits (Approval Pending)

Friday, March 10, 2006

8:30 AM -12:00 PM

Continental Breakfast – 8:30 to 9:00 AM

Westwood Club

6200 West Club Lane
Richmond, Virginia

There is no fee for FPA members

First three meetings the Guest fee is \$25.00 per meeting
Thereafter the fee is \$50.00 per meeting

RESERVATIONS ARE REQUIRED

Please call Eleanor at 706-1823 by March 6, 2006
E-mail: FPACV@AOL.COM

RENEWING MEMBERS

Congratulations to the following financial services professionals
who renewed their FPA memberships

Gary L. Ackerman
United Securities Alliance

Daniel J. Mannen, Jr., CFP®
Mannen, Williamson & Associates

James M. Shepherd, CPA/PFS, CFP®
Kuehl Shepherd Kozlowski Group

Donald G. Ackley, CFP®
Ameriprise Financial

Keith L. Muth, CPA, CFA, CFP®
Virginia Asset Management

Robert L. Thalheimer
The Community Foundation

Louis Belenkie, CFP®
Mass Mutual Financial Group

Robert C. Piscura, CFP®
Ameriprise Financial Advisors

Joel S. Williams, CFP®
Joel S. Williams & Associates

Elizabeth Flanagan
Virginia Tech

Katherine A. Powers, CLU, ChFC, CFP®
University of Richmond

Joan M. Yarus, CFP®

Robert J. Fulton, CFP®

John P. Livingston, Jr., CFP®
Merrill Lynch

Debra K. Sawyer, CPA, CFP®
Keir Educational Resources

Joshua G. Scandlen

MEMBERSHIP MEETINGS

April—No Meeting

May 10, 2006
Charlottesville, VA
Time and Location Information at a later date

June 8 & 9, 2006
Financial Planning Forum
Richmond, VA

WELCOME TO OUR NEW MEMBERS

Mark R. Fonville, CFP®
Wachovia Bank

William W. Paxton, CFP
Davidson & Garrard Inc.

Coy Davis Hewett, CFP®
PSP/Inter Securities, Inc.

Jorgen Vik, CFP®
Merrill Lynch

Gary W. Wood
Benefit Design Corporation

David E. Lynch, CFP®
New York Life Insurance Company

Scott B. Olsen, CFP®
River City Bank

Membership

Reaching Out to Financial Planning Professionals

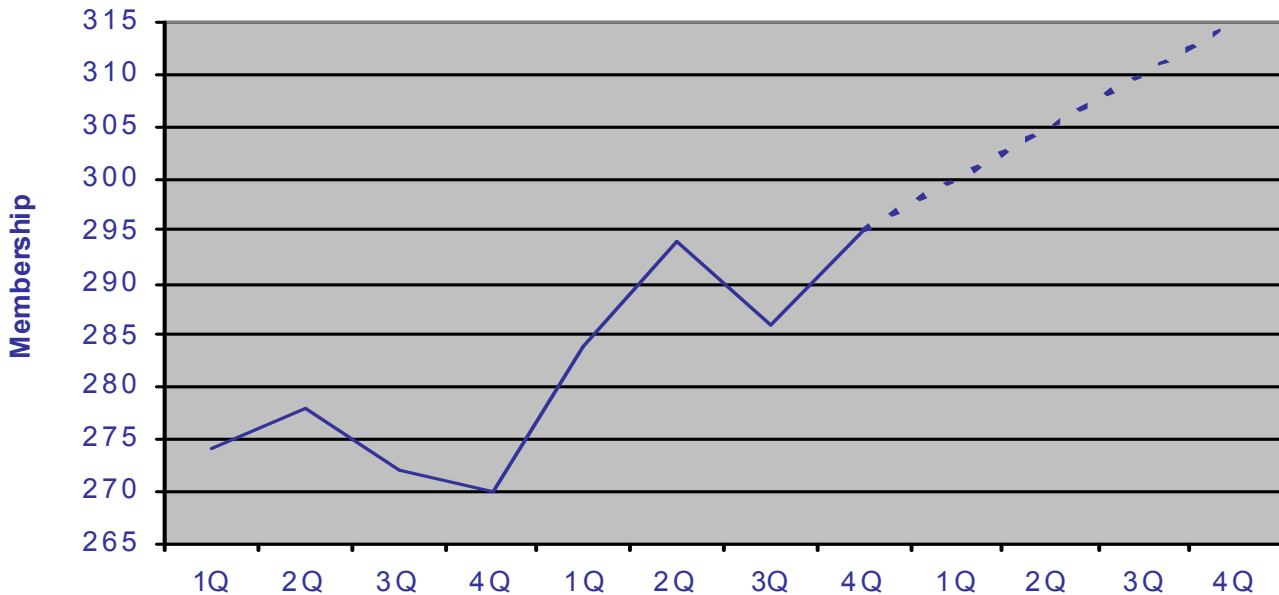
Is there someone you know who could benefit from being part of the FPA community? As the heart of the financial planning community in Central Virginia, we can reach out to our colleagues and professional friends and allow them to experience the benefits of FPA membership. How? Through **Friends are Free**, a program where members bring a first-time attendee to one of our membership meetings at no cost. To take advantage of this program, simply email FPACV@aol.com or contact Eleanor Trommer (804) 706-1823 and provide us with your guest's information.

Let's work together to increase our community chapter to over 300 members in 2006.

Membership Committee

FPA of Central Virginia

2006 Membership Goal: 315



Financial Planning Forum

The Fourth Annual Financial Planning Forum will be held at the Richmond Marriot on June 8th and 9th, so please be sure to mark these dates on your calendar. As in the past this event is a collaborative effort between the Central Virginia chapter of the Financial Planning Association and the Virginia Society of CPAs. The joint forces of the two groups insure a high standard of programming well worth your time.

The program will also offer information on many of the new concepts in planning today including Reverse Mortgages, Roth 401ks and Health Savings Accounts. As in the past you will enjoy the sessions that update us on taxes and the economy, issues surrounding small businesses and estate planning just to name a few.

Continuing educations credits will be available to those holding Virginia Life and Health Insurance licenses, the CFP Designation and CPA license. The maximum number of credits that may be obtained by attending all sessions will be 18 hours, including the ability to obtain the required Ethics credits for both CPAs and CFPS.

Watch for further details on our websites: www.fpacva.org or www.vscpa.org. All members of the two organizations will also receive a detailed brochure in the next few months. We will have space for approximately 200 attendees so, in order to get the early bird discount and secure your spot, register early.

We look forward to seeing you at the Forum

Sincerely,

FPA OF CENTRAL VIRGINIA

MARCH SPONSOR

OUR THANKS FOR SPONSORING OUR MARCH MEMBERSHIP MEETING TO

**Burl Bachman, ASA, EA, MSPA, President
Retirement Plan Administrative Service, Ltd.**

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Personal Service is Our Hallmark

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