

CE Credits

All educational offerings, pending approval, will satisfy 2 hours of MN Insurance CE, CLE, and CFP. A certificate of attendance will be available for individuals requesting PACE and CPE. Content description for each program is available at www.sfsptwincities.org on the homepage at the registration link for each program.

Program Location Addresses

Midland Hills Country Club

Midland Hills Country Club
2001 Fulham Street,
St. Paul, MN 55113
651-631-0440 www.Midlandhillsc.org

Prudential Financial

Prudential Financial
13001 Bass Lake Road
Plymouth, MN 55442
1-800-286-7745 www.prudential.com

Catholic Aid Association

Catholic Aid Association Auditorium
3499 Lexington Avenue North
St. Paul, MN 55126
651-490-0170 www.catholicaid.org

Program Registration

Online at: www.sfsptwincities.org

OR

mail the enclosed registration form and payment to:

FSP- Twin Cities
2697 East County Road E, Suite 282
White Bear Lake, MN 55110-4908

OR

contact
Sandy Beeson, Chapter Executive
Ph: 651-815-0668 Fax: 651-344-3529
E-mail: sfsptwincities@comcast.net

Chapter website: www.sfsptwincities.org

National website: www.financialpro.org

Membership Qualifications

Regular Members - Holds one of these designations:

- CASL - Chartered Advisor for Senior Living
- CEBS - Certified Employee Benefits Specialist
- CFA - Chartered Financial Analyst
- CFP - Certified Financial Planner
- ChFC - Chartered Financial Consultant
- CFL - Chartered Leadership Fellow
- CLU - Chartered Life Underwriter
- CPA - Certified Public Accountant
- CPC - Certified Pension Consultant
- CTFA - Certified Trust & Financial Advisor
- EA - Enrolled Actuary
- JD - Juris Doctorate w/license to practice
- MS, MBA, PhD - Graduate degree in Financial Services
- MSFS - MS degree in Financial Services
- MSM - MS degree in Management
- REBC - Registered Employee Benefits
- RHU - Registered Health Underwriter

Associate Members - A student of one of the above designations, having passed at least one course, or someone who holds one of the following:

- FLMI - Fellow, Life Management
- FSS - Financial Services Specialist
- LUTCF - Life Underwriting Training Council

For the following membership categories, please consult the website:

Retired ~ Nonresident ~ Student ~
Young Professional ~ Professor

Membership Dues

Regular: \$394
Associate: \$221
Nonresident: \$329
Retired: \$221
Student: \$30.50
Full-time Professor: \$122
Young Professional: \$183

The Society of Financial Service Professionals is the standard bearer for excellence in professionalism, advanced continuing education, ethical guidance and other valuable resources for the nation's top financial advisors. The Twin Cities Chapter delivers tremendous value to its members.

Join or renew your membership at
www.financialpro.org or call 800-927-2427

Membership Benefits

Continuing Education and Professional Growth - MN Insurance CE, CFP, CLE, and CPE credits at no or minimal cost to chapter members

Networking with credentialed peers in various disciplines who can help

Professional Interest Sections offer an invaluable opportunity to interact with professionals around the country in your practice area. Includes:

- Section newsletters
- Section email discussion groups

Journal of Financial Professionals

Free Subscription to Barron's during first year of membership

Archived Audio Conferences produced by FSP
Listing in membership referral service for consumers

Society e-Bulletin - FSP monthly electronic newsletter covering your profession and the financial services industry with links to more detailed material

Society Page - FSP quarterly membership magazine providing information on members, chapters, and events

Professional Tools - Including client education, support and resource access, search and research capabilities, and career center all available online at www.financialpro.org
Vendor Discounts - Including the Wall Street Journal, Hertz, Alamo/National, seminar packages, marketing tools and more

Financial Service Forum - Each Fall the FSP Forum features advanced, practice-oriented instruction by world-class speakers on a broad range of financial topics. Visit www.fspforum.com

Arizona Institute - Held each January, 4 days of education on in-depth technical topics by industry experts
Minnesota Business Ethics Award Luncheon - Each May the MBEA recognizes Minnesota businesses that exemplify and promote the highest standards of ethical conduct for the benefit of the workplace, the marketplace, the environment, and the community

Foundation for FSP - To foster research, education and ethical practices among financial service professionals in order to benefit the public

Financial Education Partners - Provides educational programs and individual counseling by volunteer members to enhance the financial literacy and financial planning abilities of those in need



The Premier
Association
for
Credentialed
Financial
Service
Professionals

2009/2010 Continuing Education Program Schedule

- ⇒ MN Insurance CE
- ⇒ Continuing Legal Education
- ⇒ CFP CE
- ⇒ CPE attendance certificate
- ⇒ PACE attendance certificate

Twin Cities Chapter
www.sfsptwincities.org

FSP National
www.financialpro.org

FSP-TC 2009/2010 CE Program Schedule

FSP-Twin Cities programs are developed for intermediate to high content for continuing education credits for financial planners, insurance producers, investment advisors, retirement counselors, estate planners, CPA's, and attorneys. FSP members attend all regular meetings at no-charge with a nominal fee for special programs and events. With the potential of 23 CE credits, FSP is committed to value for your membership investment!

August 20, 2009

“True Confessions of an Exit Strategy Advisor”

Video Training Conference produced by FSP National
8:30 AM Sign-in, 9:00 - 11:30 Program
Prudential Financial Headquarters
\$25.00 all attendees
Refreshments served

September 17, 2009

“The Recession in Perspective”

Terry Fitzgerald, Federal Reserve

“Investing in a Rising Tax Environment”

Andy Ogren, Eaton-Vance

11:00 AM Sign-in, 11:15 Lunch,
12:00 - 2:00 Program
Midland Hills Country Club
\$0 Members, \$50 Non-members
Lunch served

October 1, 2009

“Guidelines for Professional Ethical Conduct”

An Interactive Review of CFP Board of Standards Code of Ethics and FSP Code of Professional Responsibility - **Qualifies for CFP Ethics Credits**

Keith Loveland, JD, AIFA, CIDA

Loveland Consulting
8:30 AM Sign-in, 9:00 - 11:30 Program
Catholic Aid Association Auditorium
\$0 Members, \$50 Non-members
Refreshments served

October 15, 2009

“Advising Clients on Selling a Business”

Dan Mulvaney, CPA

Sunbelt Business Advisors
11:00 AM Sign-in, 11:15 Lunch,
12:00 - 2:00 Program
Midland Hills Country Club
\$0 Members, \$50 Non-members
Lunch Served

November 19, 2009

“Planning A ROTH Legacy”

April K. Caudill, J.D., CLU, ChFC

Prudential Financial
11:00 AM Sign-in, 11:15 Lunch,
12:00 - 2:00 Program
Midland Hills Country Club
\$0 Members, \$50 Non-members
Lunch served

December 10, 2009

“Hot Ideas in a Cold Economy: How Others are Succeeding in Today’s World”

Video Training Conference produced by FSP National
With an emphasis on practice, productivity, and sales topics, CE is not available on this program.
8:30 AM Sign-in, 9:00 - 11:30 Program
Prudential Financial Headquarters
\$25.00 all attendees
Refreshments served

December 17, 2009

Holiday Community Service/Social Feed My Starving Children

Package meals distributed by Feed My Starving Children to hungry children in over 50 countries and then gather for some holiday cheer at nearby Time Out Restaurant.
12:00 PM - 2:00 PM - FMSC food packing
FMSC 990 Lone Oak Road, Eagan, MN 55121
2:30 PM - 4:30 PM - Social
Time Out Restaurant
2864 Hwy 55, Eagan, MN 55121, 651-905-1111
\$35 per attendee (\$20 goes directly to FMSC)

January 14, 2010

Networking Event (No CE)

Summit Brewing Company

Brewery tour, tasting, 15-minute presentation on “Networking to Increase Your Client Base”
Speaker TBD
910 Montreal Circle, St. Paul, MN 55102
651-265-7800 www.summitbrewing.com
4:00 PM - 6:00 PM
\$15.00 all attendees

January 21, 2010

“Estate Planning in a New Environment”

Randy Zipse, John Hancock

11:00 AM Sign-in, 11:15 Lunch,
12:00 - 2:00 Program
Midland Hills Country Club
\$0 Members, \$50 Non-members
Lunch served

February 18, 2010

“Active to Passive Income”

Video Training Conference produced by FSP National
We will be joining a real-time Q&A session from FSP National during this program.
7:30 AM Sign-in, 8:00 - 10:30 Program
Prudential Financial Headquarters
\$25.00 per attendee
Refreshments served

March 18, 2010

“Succession Sabbatical”

F. David Williams, CLU

FDWilliams & Associates, LLC
11:00 AM Sign-in, 11:15 Lunch,
12:00 - 2:00 Program
Midland Hills Country Club
\$0 Members, \$50 Non-members
Lunch served

April 15, 2010

“Trends in Long-term Care”

Deb Newman, CLU, ChFC, LTCP

Newman Long Term Care
11:00 AM Sign-in, 11:15 Lunch,
12:00 - 2:00 Program
Midland Hills Country Club
\$0 Members, \$50 Non-members
Lunch served

May 19, 2010

Minnesota Business Ethics Award Luncheon

Keynote: TBD

(We will file for up to 1 credit CE on the keynote)
11:30 AM Sign-in
12:00 PM - 1:30 PM Program
Minneapolis Airport Marriott
2020 American Blvd. E.,
Bloomington, MN 55425
Cost: TBD

May 20, 2010

Topic to be determined

Video Training Conference produced by FSP National
We will be joining a real-time Q&A session from FSP National during this program.
7:30 AM Sign-in, 8:00 - 10:30 Program
Catholic Aid Association Auditorium
\$25.00 per attendee
Refreshments served

June 17, 2010

“Having Your Cake and Eating it Too - How to Keep the Family Business in the Family and Meet Financial Goals”

Larry Hause, JD

Fredrickson and Byron, P.A.
8:30 AM Sign-in, 9:00 - 11:30 Program
Catholic Aid Association Auditorium
\$0 Members, \$50 Non-members
Refreshments served