

## Who are FSP Members

The Society of FSPs' mission is to advance the professionalism of credentialed members in diverse disciplines so that they may better serve their clients' financial needs.

FSP members have earned recognized professional credentials in the financial services profession, or are working towards attaining one of the following professional credentials:

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

FSP stands behind the value of continuing education. To that end, we offer Associate membership to those professionals pursuing any of the credentials listed above (and for those who hold the FLMI (Fellow, Life Management Institute), FSS (Financial Services Specialist), or LUTCF (Life Underwriter Training Council) credentials.

## Upcoming Events\*

**Thursday, December 10, 2009**  
**Breakfast Series**  
ROTH Conversions: New and Improved  
*Joe Schilz*

**Thursday, January 14, 2010**  
**Breakfast Series**  
Status of Health Care Reform  
*Gerald Frye*

**Tuesday, February 23, 2010**  
**DVD Program**  
Making the Switch from Active to Passive Income:  
Strategies to Make it Last a Lifetime

**Thursday, March 11, 2010**  
**Breakfast Series**  
The Myth and Mysticism of Split Dollar  
*Brad Bauer*

**Wednesday, May 12, 2010**  
**Financial Professional Day**  
*8 CE credits*

**Tuesday, May 18, 2010**  
**DVD Program**  
What the Client Wants to Accomplish and  
How to Make it Happen

**June 2010**  
**Annual Business Meeting**

**Breakfast Series Information:**  
*Each worth 1 CE credit*

**DVD Programs**  
*Each worth 3 CE credits*

*\*All dates subject to change. Continuing Education credits available at all meetings excluding annual business meeting.*



## Milwaukee Chapter of The Society of Financial Services Professionals

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Milwaukee, WI 53214

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**Fax:** 414-276-7704

**Email:** lang@svinicki.com

### Website:

[www.sfsp.net/milwaukee](http://www.sfsp.net/milwaukee)

National – [www.financialpro.org](http://www.financialpro.org)

**2007 - 2009 Gold Medal of Honor Chapter**



## The Milwaukee Chapter of The Society of Financial Services Professionals Mission Statement

The Milwaukee Chapter of The Society of Financial Service Professionals (SFSP), is a society of insurance and other financial service professionals composed of graduates, designees and students of the American College.

The Chapter, through its commitment to continuing education and ethical practice, attracts and serves those diverse professionals uniquely qualified to provide services and solutions that satisfy the financial objectives of individuals, families and organizations. The Chapter shall:

1. Strengthen the competency of our members and other insurance through continuing education.
2. Increase awareness of members' professional expertise and qualifications among the public and allied professionals.
3. Encourage and sponsor enrollment in and completion of the educational programs of the American College.
4. Provide and foster the highest standards of ethical conduct.
5. Work with The American College and The Society to further the development of the financial services profession.
6. Maximize the size and diversity of the Chapters' membership.
7. Maintain cooperative relationships with professionals and other financial service organizations.
8. Fulfill the needs of an increasingly diverse membership by maintaining an effective organizational structure for the Chapter.

## SFSP Membership Value

- **Continuing Education Credits (CE)** – High Quality at a low cost. Under \$25 per credit (Includes Membership).
- **Opportunity to network with local financial service professionals** – This helps younger professionals establish their contact base and established professionals grow their contact base.
- **Ability to approach client planning from a new perspective** – The high-level multidisciplinary environment found within the Society promotes the “team approach” that many businesses rely on.
- **Journal of Financial Service Professionals search capability and the quality of the publication** – Many journal articles cover topics that are current issues that can be located by a simple search on the Society's website.
- **The Society's Sections offer discussion groups as an excellent resource for problem solving** – This provides the opportunity to discuss daily practice and current issues with professionals around the country.
- **Professionalism of membership** – The Society has a strong reputation for technical expertise, ethics and professionalism.
- **Quality of educational programs** – The Society is best known for it's educational opportunities that are concentrated entirely in the financial services arena.



## Officers:

**President:**  
John Muth, JD, CLU, CFP

**President-Elect:**  
Carl Holborn, JD

**Secretary/Treasurer:**  
Gerald Frye, CLU, RHU, REBC, ChFC, CASL

**Immediate Past President:**  
Dennis Hollman, JD

## Board of Directors:

Laura Bouslough  
Gail Gabrelian, CLU, ChFC

David Jenkins, BS  
Mark Krueger, CPA

David Laske, CPA, BS, MS Taxation  
Mark Lieberthal, MSB, MHS

Rick Swider, CLU, ChFC  
Matt Schumacher

Paul Tourville, CMFC

## Staff:

**Executive Director:**  
Kelly Lang

## Thank you to our Sponsors:

**The Benefit Services Group, Inc.**

**BlackRock, Inc.**

**Bryant & Stratton College**

**Kolb+Co. SC**

**MetLife**

**Northwestern Mutual Financial Network**

**O'Neil, Cannon, Hollman, DeJong, SC**

**Wisconsin Business Center  
– Principal Financial Group**

Yes! Please accept my application for membership in the Society of Financial Service Professionals and the Milwaukee Chapter.

Name \_\_\_\_\_ Designations/Degrees \_\_\_\_\_  
 Nickname \_\_\_\_\_  
 Firm/Agency \_\_\_\_\_ Primary Co. Affiliation \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_  
 Business Phone \_\_\_\_\_ Fax \_\_\_\_\_  
 E-mail \_\_\_\_\_

Referring Members Name (if applicable) \_\_\_\_\_  
 I agree to be governed by the Bylaws of the Society and the Chapter and conform to the Codes of Professional Responsibility of the Society of Financial Service Professionals

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_  
 Please complete this application and forward with payment to:  
 Society of Financial Service Professionals  
 PO Box 1374  
 Bryn Mawr, PA 19010-1374

1. NATIONAL DUES Regular: \$244 Associate: \$122 Retired/Disabled: \$122 \$ \_\_\_\_\_  
 2. MILWAUKEE CHAPTER DUES Regular: \$106 Associate: \$36 Retired/Disabled: \$36 \$ \_\_\_\_\_  
 3. SECTION(S): (Membership is a prerequisite to join a section.)  
 Rates – Initial Section FREE; \$35 for each additional Section.  
 Sections – Please indicate which Section(s) you would like to join:  
 Electronics Solutions Package  
 \$60 – Includes all Sections  
 Business & Compensation Planning  
 Employee Benefits  
 Estate Planning  
 Financial Plannings  
 Investment Management  
 Leadership & Management  
 Multiple Risk Management  
 Qualified Plans  
 Retirement Counseling

SECTIONS DUES TOTALS \$ \_\_\_\_\_  
 4. Total Dues \$ \_\_\_\_\_  
 Enclosed is my check for \$ \_\_\_\_\_ made payable to the Society of Financial Service Professionals.  
 Check-O-Matic (form will be sent)  
 Charge:  MasterCard  Visa  AMEX for \$ \_\_\_\_\_  
 Credit Card # \_\_\_\_\_ EXP. Date \_\_\_\_\_  
 Signature \_\_\_\_\_