

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*

Tuesday, November 18, 2008

DVD Program

Deferred Compensation for
the Small Business Market

Thursday, December 11, 2008

Breakfast Series

Steve Parrish

Thursday, January 8, 2009

Breakfast Series

From Lift-off to Landing: Business
Intelligence and Your Benefit Programs
Gerald W. Frye

Tuesday, February 24, 2009

DVD Program

Different Strokes for Different Folks:
Between Plan Design and Personal
Goals, the Choices are Limitless

Thursday, March 12, 2009

Breakfast Series

IRA Conduit Trusts: Don't Do a
Stretch Distribution Without One
John Bannen

Wednesday, May 13, 2009

Financial Professional Day

The Financial Professional's Role
in Retirement Planning
8 CE credits

Tuesday, May 19, 2009

DVD Program

True Stories in Succession Planning
and Exit Strategies

June 2009

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

National – www.financialpro.org

**2007 & 2008 Gold Medal
of Honor Chapter**



Financial Service Professionals

6737 West Washington Street
Suite 1420
Milwaukee, WI 53214

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:
Dennis Hollman, JD

President-Elect:
John Muth, JD, CLU, CFP

Secretary/Treasurer:
Brenda Marek, CLU, ChFC

Immediate Past President:
Michael Dow, CPA, CLU, ChFC

Board of Directors:

Gerald Frye, CLU, RHU, REBC

Gail Gabrelian, CLU, ChFC

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Dick Murray, CLU, CFP

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Paul Tourville, CMFC

Jennifer Zabel, JD

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Executive Director:
Kelly Lang

Account Assistant:
Jenni Rodriguez

Thank you to our Sponsors:

The Benefit Services Group, Inc.

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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 _____ Fax _____
 Business Phone _____
 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

VISA, MasterCard, or AMEX
 payments may fax applicant
 to 610-527-1499

1. **NATIONAL DUES**
 Regular: \$236 Associate: \$118 Retired/Disabled: \$118 \$ _____
 2. **MILWAUKEE CHAPTER DUES**
 Regular: \$89 Associate: \$35 Retired/Disabled: \$35 \$ _____
 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-Or-Matic (form will be sent)
 Charge: MasterCard Visa AMEX for \$ _____
 Credit Card # _____ EXP. Date _____
 Signature _____