



One Thing Leads to Another...

Get involved and make a difference! With over 1,100 members in Massachusetts, if we all just did ONE THING, imagine the impact we can have on shaping our profession!

FPA Committees that would welcome YOU....

Career Development: Be a mentor; reach out to students; encourage new financial planning professionals.

- Staff a booth at the annual Career Fair
- Mentor one new planner for three months
- Help coordinate a study group for students

Consumer Awareness: Elevate public awareness; promote financial literacy.

- Be a money mentor at the State Treasurer's Money Conference for women
- Scoop ice cream and make a difference in someone's life at YWCA events
- Lead a basic investment workshop

Legislative Affairs: Help shape legislation and the future of the profession.

- Participate in Financial Planning Day at the State House
- Interact with legislators at a Beacon Hill breakfast
- Attend a hearing on advisor regulatory issues

Member Communications: Sharpen your communication skills; engage members in FPA MA events.

- Edit content on the web site
- Contribute an article to the newsletter

Membership: Increase Chapter membership.

- Help plan a social event
- Distribute membership information at the quarterly meeting
- Make telephone calls to welcome new members
- Join an advisor practice group

Pro Bono: A call to action... give the gift of education through large-scale initiatives.

- Assist military families whose loved ones are serving overseas
- Counsel cancer patients and their families
- Help baby boomers plan for retirement at the Boston Public Library

Partnerships: Create alliances with partners.

- Draft a survey to evaluate partner satisfaction
- Meet with partners at a quarterly roundtable
- Welcome partners who exhibit at a quarterly meeting

Programming: Infinite Possibilities: Integrating our Life and Profession with Education and Inspiration.

- Suggest topics and speakers for educational programs
- Reach out to an author who has stimulated your professional thinking
- Review and critique a potential speaker's presentation in your area of expertise

Public Relations: Enhance your visibility and be seen as a financial planning resource.

- Answer finance-related queries from the press
- Develop a relationship with your local newspaper editor
- Attend free training on how to work with television, radio and print media

National Conference – FPA Boston 2008: Be a model of Revolutionary Thinking.

- Greet visitors from other nations
- Help assemble guest packets
- Coordinate attendance at Chapter booth

Questions.. Comments..

How can I start my One Thing?

Chair

Mark Passacantando
fpp1@verizon.net
781-762-7622

President

Dianne Webster
dwebster@ifslegacy.com
978-834-9066

President Elect/Consumer Awareness

Deb Maloy
deb.maloy@maloyfinancial.com
781-245-3466

Career Development

Barb Attardo
battardo@tofias.com
617-761-0622

Legislative Affairs

Diane Miller
dfmdfm@aol.com
617-625-2551



Membership

Garrett Pierce
Garrett.pierce@pioneerinvestments.com
617-422-4696

Member Communications

Donna McKeown
Donna.McKeown@polimortgage.com
781-801-1473

Partnerships

John Napolitano
jnap@uswealthcompanies.com
781-849-9200

Pro Bono

Jim Thompson
jthompson@village-bank.com
617-467-6105

Programming

Chris Duffy
cmduffy@capitalanalystsne.com
617-786-1600

Public Relations

Chris Theroux
ctheroux@metlife.com
508-870-1925

Boston 2008

Lena Mandelis
lena@mandelis.com
781-431-8787