

CE Credits/Registration/Handouts

All educational offerings are developed for intermediate to high educational content and, pending approval, will satisfy 2-hours of MN Insurance CE, CLE (legal) and CFP credits. A certificate of attendance will be available for individuals requesting PACE and CPE (accounting).

Advanced registration with program fee payment is required. A registration confirmation with a link to the program handouts is emailed prior to each program. The handouts will also be posted in the member section of the chapter website.

For questions on current programs or suggestions for future presentation topics, contact FSP-Twin Cities Program Co-Chair:

Jon Kennedy, CFP

952-838-3561 jkennedy@meristemmo.com

Program Registration

Members: \$15.00 per program (except as noted)

Non-members: \$50.00 per program

Member Program Pass: \$150 for all programs (except MBEA and FMSC) July 2011 - June 2012

Register Online: www.sfsptwincities.org

Contact us:

U.S. Mail:

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

Phone: 651-815-0668

Email: admin@sfsptwincities.org

Chapter website: www.sfsptwincities.org

National website: www.financialpro.org

Program Location Addresses

Midland Hills Country Club

2001 Fulham Street,
St. Paul, MN 55113 www.Midlandhillsc.org

Oak Ridge Country Club

700 Oak Ridge Road
Hopkins, MN 55305 oakridgecountryclub.net

Park Place West Tower

6465 Wayzata Blvd., Conference Room
St. Louis Park, MN 55426

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
- CIMA - Certified Investment Management Analyst
- CFL - Chartered Leadership Fellow
- CLU - Chartered Life Underwriter
- CPA - Certified Public Accountant
- CPC - Certified Pension Consultant
- CPCU - Chartered Property & Casualty Underwriter
- 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 -

Professionals pursuing any of the credentials listed above and for those who hold the following credentials:

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

For the following membership categories, please consult the website:

**Retired ~ Nonresident ~ Student ~
Young Professional ~ Professor**

2011 Membership Dues

Regular: \$460.00	Nonresident: \$385.00
Associate: \$255.00	Full-time Professor: \$160.00
Retired: \$255.00	Student: \$45.00
Young Professional: \$230.00	

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 610-526-2500

Membership Benefits

Continuing Education

MN Insurance CE, CFP, CLE (legal), and CPE (accounting) 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

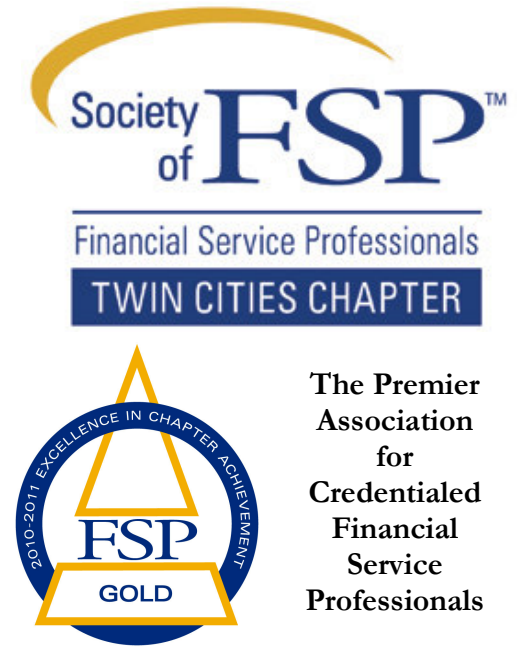
Vendor Discounts - Including the Wall Street Journal, Hertz, Alamo/National, seminar packages, marketing tools and more

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



2011/2012 Continuing Education Program Calendar

25 CE credits offered through the 2011 calendar appropriate for financial planners, insurance producers, investment advisors, retirement counselors, estate planners, CPAs, and attorneys

- ⇒ **MN Insurance CE**
- ⇒ **CLE (Legal Education)**
- ⇒ **CFP (Certified Financial Planner)**
- ⇒ **CPE (accounting) attendance certificate**
- ⇒ **PACE attendance certificate**

Twin Cities Chapter
www.sfsptwincities.org

FSP National
www.financialpro.org

FSP Twin Cities 2011 Program Calendar

July 21, 2011 (2 Credits applied for)

What's Happening in 2011/2012: Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010

Richard C. Martin, JD, LLM, CFP, CLU, ChFC,

MassMutual Financial Group

11:00 AM Sign-in, 11:15 Lunch

12:00 - 2:15 CE Program

Midland Hills Country Club

\$0 Members, \$50 Non-members

Lunch served

August 18, 2011 (3 Credits applied for)

Guidelines for Professional Ethical Conduct

An Interactive Review of CFP Board of Standards Code of Ethics and FSP Code of Professional Responsibility - **Qualifies for 3 hours CFP ethics credits and MN Insurance ethics credits**

John R. Bedosky, JD

Waybridge Law Group, LLC

8:30 AM Sign-in, 9:00 - 12:00 Program

6465 Wayzata Blvd., Minneapolis

\$15 Members, \$50 Non-members

Light continental breakfast served

September 15, 2011 (2 Credits applied for)

Investment Advising at the Confluence of What is Free, Alpha, & Behavioral

Gregory A. Carlson, CFP

Carlson Capital Management, Inc.

11:00 AM Sign-in, 11:15 Lunch

12:00 - 2:15 CE Program

Oak Ridge Country Club

\$15 Members, \$50 Non-members

Lunch served

October 20, 2011 (2 Credits applied for)

Estate Planning & Tax Laws

Randy Zipse

John Hancock Life Insurance

11:00 AM Sign-in, 11:15 Lunch

12:00 - 2:15 CE Program

Midland Hills Country Club

\$15 Members, \$50 Non-members, Lunch served

November 17, 2011 (2 Credits applied for)

Managing Taxes: Working with three levels of taxation & tax focus about Roth IRA conversions: cautions you need to know

Jim Johnson, JD, CLU, ChFC

Allianz

8:30 AM Sign-in, 9:00 - 11:15 CE Program

Oak Ridge Country Club

\$15 Members, \$50 Non-members

Light continental breakfast served

December 15, 2011 (2 Credits applied for)

A Fond Farewell and Basics of Estate Settlement: A Walk Through the Probate Process in Minnesota

Jeannie McGill, CSA, CPC and

Jason Schuler, Esq., AIF

Securian Trust

8:30 AM Sign-in, 9:00 - 11:15 Program

6465 Wayzata Blvd., Minneapolis

\$15 Members, \$50 Non-members

Light continental breakfast served

January 19, 2012 (2 Credits applied for)

Hour 1:

How to Successfully Build a Block of Business

Ralph Steiner, CLU, ChFC

Transition Brokers

Hour 2:

Your Business will be Transitioned...Are You Ready?

Brad Pratt, CLU and Brian Pratt, CFP

Pratt Kutzke & Associates LLP

11:00 AM Sign-in, 11:15 Lunch

12:00 - 2:15 CE Program

Midland Hills Country Club

\$15 Members, \$50 Non-members

Lunch served

February 2, 2012 (No CE)

Community Service/Social Event

Feed My Starving Children

Package meals to be distributed by FMSC to hungry children in over 50 countries and then gather at nearby Time Out Restaurant for some social time.

2:30 PM - 4:30 PM - FMSC food packing

FMSC 990 Lone Oak Road, Eagan, MN 55121

5:00 PM - 7:00 PM - Time Out Restaurant

2864 Hwy 55, Eagan, MN 55121, 651-905-1111

Appetizers and beverage provided

\$35 per attendee (\$20 goes directly to FMSC)

February 16, 2012 (2 Credits applied for)

Understanding Markets During Turbulent Times

Bill Wilson

Churchill Group

11:00 AM Sign-in, 11:15 Lunch

12:00 - 2:15 CE Program

Midland Hills Country Club

\$15 Members, \$50 Non-members

Lunch served

March 15, 2012 (2 Credits applied for)

Hour 1:

Succession Planning Concepts: Business Valuation, Buy Sell Planning and More...

Steve Parrish, JD, CLU, ChFC, RHU

Principal Insurance

Hour 2:

The Most Significant Financial Event of Your Life - Your Business Transition

Paul Cronin

Cornerstone

11:00 AM Sign-in, 11:15 Lunch,

12:00 - 2:15 CE Program

Midland Hills Country Club

\$15 Members, \$50 Non-members

Lunch served

April 19, 2012 (2 Credits applied for)

Hour 1:

Recruit, Retain, Reward, and Recover the Cost of Your Most Valuable Asset...Your Key People

Randy Kemnitz, MS, CLU, CFP

Business Planning & Executive Benefits

Hour 2:

Equity Compensation and Incentive Plans

Wilfred F. Becker, Jr., ASA, MBA

Chartwell Capital Solutions

11:00 AM Sign-in, 11:15 Lunch

12:00 - 2:15 CE Program

Midland Hills Country Club

\$15 Members, \$50 Non-members

Lunch served

May 16, 2012 (No CE)

Minnesota Business Ethics Award Luncheon

Keynote: TBD

11:30 AM Sign-in

12:00 - 1:30 Awards Program

Location: TBA

Cost: TBD

May 17, 2012 (2 Credits applied for)

Fundamentals of Alternative Investments and their Application to Portfolio Construction

Patrick Regan, CFA

Meristem

11:00 AM Sign-in, 11:15 Lunch

12:00 - 2:15 CE Program

Midland Hills Country Club

\$15 Members, \$50 Non-members

Lunch served

June 21, 2012 (2 Credits applied for)

Breaking Down Barriers: How to Overcome Barriers That Impede Professionals From Working Together Collaboratively

Larry D. Hause, JD, Fredrikson & Byron, P.A. and Hause Family Business, Cary

Tutelman Ph.D. and Iris Cornelius, Ph.D.

with Cornelius and Associates, LLC

8:30 AM Sign-in, 9:00 - 11:15 CE Program

Oak Ridge Country Club

\$15 Members, \$50 Non-members

Light continental breakfast served