

Member Highlight

Please see the interview below and if you haven't met Matt make a point of saying hello at the next FSP-Twin Cities program—or drop him a note! New Members bring greater diversity to our network of financial professionals and more opportunities for collaboration! Invite a professional you respect to join you at an upcoming program.

Information and registration available at www.sfsptwincities.org



Meet New Member Matt Buckley, Esq.

Contact Information:

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Member Since: 10/11/2016

Referred by Member Greg Goeders, CFP®, CLU

Name: Matthew W. Buckley

Professional Designations: Esq.; J.D.

Where did you grow up? Brooklyn Park, MN

Where did you go to college? Hamline University

Where did you get your professional training? Hamline University School of Law

Share some information about your practice/firm. For more than 40 years Courey, Kosanda & Zimmer, P.A. has offered highly effective legal representation and responsive personal service to business owners and individuals in the Twin Cities Metro Area and throughout Minnesota. CKZ is committed to meeting the individual needs of our clients when they are facing issues related to: Corporate law; Commercial law; Business and succession planning; Estate planning and wealth transfers; Probate and trust administration; Tax planning; Civil litigation and Real estate

What do you specialize in? Corporate law, business and succession planning, estate planning and wealth transfer, and Probate/Trust administration.

What kind of clients/customers do you like to work with? Highly motivated individuals who are looking for legal counsel to help effectively avoid obstacles and overcome hurdles.

How do you get new clients? Networking and referrals from past clients or various business relationships.

How has your business changed over the years? The financial diversity and needs of business clients and individuals.

What are your current professional concerns/challenges? Technology has changed drastically over the past 20 years. We live in a society that expects immediate responses, information and answers. Keeping up with the constantly changing technology and immediate client demands will continue to be a challenge for any legal professional.

What is something we wouldn't know about you that you would like to share? Continued on page 2

I am a big Wild and Vikings fan.

How about family? Married to my beautiful wife, Jen.

Any hobbies/volunteer activities? I regularly volunteer at the Minnesota Wills for Heroes program.

How were you introduced to FSP? Greg Goeders brought me to a meeting as a guest.

Why did you become a member? FSP provides a great opportunity to learn and build relationships with motivated people who have overlapping clients.

How will being a member of FSP help you in your practice? It will give me the opportunity to expand my knowledge, learn from the success of others, attain new clients and tell others about my business.

What benefits do you use (or will use) most often from your FSP Membership? The lunch conversation series.

Thanks Matt!

We look forward to your participation in FSP-Twin Cities!

Membership Co-chairs,

Marlys Schmitt, CPCU
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The graphic features the FSP logo (Society of Financial Service Professionals) and the text 'Twin Cities Chapter'. It includes a collage of photos showing professionals in meetings. The main text reads: 'Building Relationships and Expertise across Financial Services'. Below this, it states: 'FSP is the Premier Community of Credentialed Financial Service Professionals'. It lists three key benefits: 'Reflecting the multidisciplinary nature of financial services today—' (build strong teams and strong referral systems), 'Bringing together the industry experts of today and the thought leaders of tomorrow—' (see the value of our history as the foundation of our future), and 'Providing benefits that build success— for advisors and their clients' (relationships across sectors, top-quality, practical education, world-class resources, publications, shared commitment to ethical conduct and services, opportunities for leadership and service). It also mentions a discount for Young Professionals status (40 years old and under) at 50% of national dues. Contact information for Sam Rouman (Chapter President) and Sandy Beeson (Chapter Executive) is provided, along with the website www.sfsptwincities.org.

**Members of FSP
may invite potential members
to attend a program as a
first time guest -
free!**

Register a guest online at:

www.sfsptwincities.org

**Monthly program links
are at the
website home page
upper left corner.**