
FPANJ

The Financial Planning Association of New Jersey

Strategic Plan for the Public Awareness Committee for 2007

Vision/Mission: To promote FPA, the financial planning process and its values to the general public, allied professionals, governmental bodies, schools and our members. Financial planners and the FPA should be at the top of the list when the public thinks about personal finances. Therefore, we must increase exposure of FPA and the financial planning process by showing its utility for individuals and families in very diverse economic circumstances.

Fostering Trust: Financial planning is the process of meeting life goals through the proper management of one's finances. FPA is the heart of financial planning; financial planning is at the heart of financial literacy; and financial literacy is essential for everyone in today's world. With our core values and ethical standards we hold a unique position between those who deliver, support and need financial planning.

Developing Strategy:

- Establish cooperative relations with existing coalitions to promote financial planning as an essential core in financial literacy programs
- Endorse & support statewide programs that fit our stated objective
- Establish and/or expand educational programs with any of the following organizations: NJ National Guard, Habitat, high schools, domestic abuse shelters, and business groups.
- Promote the establishment of a statewide speakers' bureau and have FPA members participate.
- Participate in NJ Saves Week- National Guard Financial Fitness Day and/or individual workshops for Guard families, High School Financial Health Day (with simulation), Explore an EITC Pilot Program
- Explore opportunities to promote the financial planning process at the community college level
- Assist in promoting Financial Planning Week
- Encourage member input and participation by publicizing the committee activities at all Chapter meetings.

Energizing Alliances:

Internal Allies: Our members, Pro Bono & Public Relations committees: They can assist in delivery of services and helping to increase the visibility of FPA & the financial planning process. We can provide leads for one-on-one planning opportunities and PR for the chapter.

External Allies: Allied professionals — CPA's & attorneys: develop joint ventures that promote financial planning. With existing associations/coalitions & business groups: make FPA visible in

personal finance discussions & programs.

Activating Transformations:

- Provide members with information on Public Awareness & Pro Bono activities of FPA so that each member will publicize these initiatives.
- Provide members with the opportunity to participate in the activities and to provide input back to the committee.
- Encourage each chapter member to make their FPA membership known in dealing with clients, groups, and media.
- Provide allies with information on our Chapter activities.

Measuring Results:

- Build a core committee of 5 people
- Sign up 5 additional chapter members to assist on projects
- Schedule at least 4 public speaking opportunities
- Represent FPA at 2 major state-wide public gatherings
- Participate in NJ Saves Week
- Participate in coalition meetings
- Provide leads to the Pro Bono and Public Relations committees.