

June 8th Ethics Dinner Meeting Notice

Dinner Meeting at a Glance

Tuesday, June 8, 2010
5:00 p.m. Registration & Networking
5:30 p.m. Program Begins (dinner
included)
8:00 p.m. Program Adjourns

ADVANCE REGISTRATION IS STRONGLY ENCOURAGED!

Antonees (The Elk's Club)
115 North Broadway
White Plains, NY
[Click here](#) for directions.

Note re parking: If no space is
available in the parking lot, please park
either in front of Antonees alongside the
curb or on the side street directly across
from Antonees.

IMPORTANT NOTICE RE CREDITS:

This program has been submitted to
CFP Board of Standards for two (2)
Ethics credits required every two years
for CFP® Certificants .

To receive CFP credit: please come
prepared to provide your CFP®
REGISTRANT ID and/or the
LAST FOUR DIGITS OF YOUR SSN #.

To Register:

E-mail your reservation to
office@fpaghv.org
or call Lori Somerville at
877-817-8400 or pay by credit card
online at our
[FPA Store](#).

Dinner Meeting Fees:

*FPA GHV Season Pass Holders:

\$45 Advance - \$55 at door

FPA GHV Non-Season Pass

Holders & Other FPA Chapter

\$55 Advance - \$65 at door

Non-Members:

\$65 Advance - \$75 at door

***Ethics course not included in
season pass, but discounted rates
apply.**

*If paying at the door, check or cash
only (space permitting).*

A Case for Ethics

presented by

James Tissot, CFP®

We are pleased to announce that **James Tissot, CFP®, Chairman of the FPA New York Chapter**, will be presenting "**A Case for Ethics**" courtesy of Keir Educational Resources at our June dinner meeting. The program includes a review of the major changes to the CFP Board's Standards of Professional Conduct using a case study to illustrate important concepts. Participants will examine CFP Board Code of Ethics principles in light of recent changes that went into effect on July 1, 2008, and became enforceable on January 1, 2009. Attendees will learn how the Code has changed over time, review new terminology and definitions that have been introduced in the newest version, and examine rules that have been removed and new rules now in play.

CFP Board expects all CFP® professionals to integrate the updated Standards into their daily practice, so here's your chance to get the learn what you need to know about the Standards while enjoying some good wine, good, food, and networking time with your friends and colleagues before our summer hiatus begins!

About James Tissot

James Tissot is a CFP® (Certified Financial Planner) Practitioner currently practicing in New York City, Westchester County and the Hudson Valley. In addition, Mr. Tissot has successfully completed his Series 7 and Series 63 examinations and has obtained his NYS license for life and health insurance. He is the President and founder of Prism Planning, Inc., a fee-only Registered Investment Advisor. Mr. Tissot pursued his Bachelor's degree at the University of Michigan where he majored in Psychology and Philosophy. He came to a Financial Planning career due in large part to the AIDS crisis. To better assist a friend afflicted with HIV/AIDS, James started attending seminars offered at the Lesbian and Gay Center on financial planning for the disabled and terminally ill, sponsored by "Body Positive." Whether through the love of a friend, passion of cause or assimilation of past business exposure, he found he had an acumen for this type of work. He then went back to school to gain the formal education to become a CERTIFIED FINANCIAL PLANNER™. Mr. Tissot gained his Certificate of Financial Planning through New York University while simultaneously taking further financial courses at SUNY. He serves as the Chair of the FPANY Board of Directors. In addition, he served on the CLRC for the National FPA; a liaison committee between the National Board and chapters leaders. In his former position as Director of Career Development, he initiated a "CFP® Education Program," providing a resource center and supplemental exam preparation to the CFP® candidates. He is a member of the PridePlanners Association and continues his pro bono work with those with HIV/AIDS. He frequently conducts seminars on non-traditional family planning and was recently retained by the Episcopal Church Pension Group in that area. In addition to his practice, he is an editor and instructor for Keir Educational Resources, a publisher of financial education materials. In that position he writes materials for as well as teaches live reviews for the CFP® Certification Examination. He has edited books on financial calculators and writes and edits materials for all FINRA Series exams. These activities keep him current of all regulatory and tax changes.

Meeting Cancellation Policy:

If we must cancel this meeting, an email will be sent to all registrants for whom we have an email address. If you are unable to check your email, call 877-817-8400 and the announcement will clearly indicate whether it is cancelled. Except in unusual circumstances, we would know about the cancellation at least 3-5 hours before the meeting. If you should need to cancel, let us know by 4 pm on Friday, June 4th. There will be a \$30 charge if you do not cancel and do not attend.

IMPORTANT NOTE RE CREDITS: If you have already fulfilled your Ethics credit requirements, this course (if approved by CFP Board of Standards) would offer two (2) non-Ethics CFP CEUs.

Our Thanks to our Gold Partner for Supporting our Chapter!



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