



2018 CAREER DEVELOPMENT COMMITTEE - Plan of Work

**FPA is the community that fosters the value of financial planning, and advances the practice and profession of financial planning.**



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| Director: | Nick Thunker | nthunker@silveroakwealth.com |
| Vice: | Open |  |

 Committee Members:

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| Chloe Briel | Jenna Ecker | Dan Hiebert |  |
| Sara Kantor | Molly Sullivan |  |  |
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**PASSION STATEMENT**

***The Career Development Committee is dedicated to supporting the FPA in its efforts to build a strong professional community, especially through those new to the profession.***

**3 MAIN STRATEGIES
As a guide, strategies are not specific projects.**

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| **Strategy 1** | Engage career changers  |
| How will we communicate with our targeted audiences? | Through FPA Connect, email, PR Committee, Chapter meetings, visits to CFP courses, newsletters, other FPA members.  |

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| **Tactics to Fulfill Strategy** | Target Date | Committee Member(s)Spearheading | Value that should be Communicated. |
| Continue to be in touch with Financial Planning Program night classes – St. Thomas and Mankato | Ongoing – 6/1  | Nick | Communicate the value of FPA to the students in programs: education, networking, connecting, job centers, mentorship opportunities, resume resources, tools.  |
| Career Day | 2/18 | Nick | Ability to interview with hiring firms, end-of-day speaker, roundtable discussions. |
| Promote scholarship opportunities  | 12/31 | Megan | Communicate value of all available scholarships: Montgomery, Residency, Symposium, Kaplan, scholarships that are available through the CDC. |

 **Ways to Integrate Ideas and Collaborate
How does what you do integrate with what other committees/organizations do?**

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| Alliance | What can we provide? | What can they provide? |
| PR Committee  | Provide content to push out on social media pages | Assistance in getting the word out about FPA and the benefits to career changers. |
| Kaplan | Exposure to students in CFP® programs, show value of membership, advertisement on the website  | Scholarships for exam prep possible, class time to speak to students. |
| New Member Committee | Potential new FPA members  | Collaboration to visit financial planning program classes to communicate value of membership.  |

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| **Strategy 2** | Engage undergrad students |
| How will we communicate with our targeted audiences? | Through FPA connect, email, PR Committee, University Career Centers, professors, school visits, newsletters, other FPA members.  |

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| Tactics to Fulfill Strategy | Target Date | Committee Member(s)Spearheading | Value that should be Communicated. |
| Promote scholarship opportunities  | 12/31 | Megan | Communicate value of all available scholarships: Montgomery, Residency, Symposium, Kaplan, scholarships that are available through the Career Development Committee.  |
| Continue connections with University Partner Program at Mankato | Ongoing – 12/31 | Nick | FPA (MN and National) resources to be shared with the university. Make trips to continue relationship communication.  |
| Continue connections with University Partner Program at UMD | Ongoing – 12/31 | Megan | FPA (MN and National) resources to be shared with the university. Make trips to continue relationship communication.  |
| Career Day | 2/18 | Nick | Ability to interview with hiring firms, end-of-day speaker, roundtable discussions. |
| Explore local university setting up Financial Planning program | 6/30 | Megan | FPA (MN and National) resources – how can a university benefit from a financial planning program?  |

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How does what you do integrate with what other committees/organizations do?**

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| --- | --- | --- |
| Alliance | What can we provide? | What can they provide? |
| PR Committee  | Provide content to push out on social media pages | Assistance in getting the word out about FPA and the benefits to career changers |
| Kaplan | Exposure to students in CFP® programs, show value of membership, advertisement on the website  | Scholarships for exam prep possible, class time to speak to students |
| NexGen Committee | Additions of NexGen members | Introduction to NexGen community |
| General Membership | Opportunities to play a volunteer role for members that have connections with local universities | Connections to local schools/professors/etc. to provide an opportunity to explore setting up a financial planning program.  |

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| **Strategy 3** | Improve current member experience relative to the Career Development Committee  |
| How will we communicate with our targeted audiences? | Through FPA Connect, email, PR Committee, Chapter meetings, visits to CFP courses, newsletters, other FPA members.  |

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| Tactics to Fulfill Strategy | Target Date | Committee Member(s)Spearheading | Value that should be Communicated. |
| Enhance job site/resume posting | 6/30 |  | Ability to review job postings and post/review resumes of those looking for work in the industry. |

**Ways to Integrate Ideas and Collaborate
How does what you do integrate with what other committees/organizations do?**

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| --- | --- | --- |
| Alliance | What can we provide? | What can they provide? |
| PR Committee  | Provide content to push out on social media pages | Assistance in getting the word out about , publicity of need for new volunteers |
| FPA National/other FPA Chapters | Feedback with our current/ongoing experiences  | Provide explanation and feedback on current programs  |