For two decades, the FPA Residency program has offered planners the opportunity to grow professional skills sets that complement their technical training. Through a week of intensive learning, attending ‘residents’ examine case studies, engage in real world practice management discussions, and work side-by-side with nationally recognized CFP® practitioners.

The goal of FPA Residency is to turn planners into trusted advisers who create and maintain lasting client relationships. The skills taught at Residency give planners the ability to build trust, confidence and credibility with clients at the same time when formal planning is building ways for clients to achieve their life goals.

Residency is a transformational experience that benefits both planners and the clients they work with. It is an investment in a successful career and in the very mission of financial planning. I am confident that you will find, as so many graduates before you, that the Residency Experience will be transformational for yourself, your practice and the experience of your clients in working with you!”

Tom L. Potts, Ph.D., CFP®
President, Financial Planning Association

“As a Residency Dean, I know as well as anyone what a transformational impact Residency can have on participants. But it was something else to experience the difference first-hand, when one of my employees went through the program. This individual was technically very advanced and had always worked well with clients, but after completion of Residency, there was an increased confidence and wisdom – what I would describe as a profound realization of what financial planning is all about. An understanding, at a deep level, that technical competency, while critical, is just the beginning. Furthermore, the experience and enthusiasm Residency engendered seemed not only to last, but to grow more powerful over time. I think it is among the best human capital investments I have ever made.”

Laura Tarbox, CFP®
The Tarbox Group Inc., Newport Beach, CA
Dean Emeritus, FPA Residency

The 2010 Mentor Team:
• Carolyn Kaufman, CFP®, LLM, LLFD
• Elizabeth Jetton, CFP®, Past National President, FPA
• Kacy Gott, CFP®, CPA, Past National Board Member, FPA
• John Longstaff, Past National President, FPA (ICFP)
• David Bergmann, CFP®, EA, CLU, ChFC, Past National Board Member, FPA (ICFP)

PROGRAM DESCRIPTION
University of California, Irvine Extension and the Financial Planning Association (FPA) are once again joining forces to offer the FPA Residency Program October 24-29, 2010.

The six-day, nationally recognized FPA Residency Program will provide you with a number of benefits that you won’t find anywhere else, including three months of work experience and 30 hours of CE.

Working on a variety of technical areas through case studies in teams and with mentors, you will engage in dialogues about what you are learning, exam how your experiences help you to understand what worked/didn’t, and spend time with successful planners to discover how they have dealt with some of the issues that you face as you grow your own career.

The 2010 Mentor Team:
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• Elizabeth Jetton, CFP®, Past National President, FPA
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• David Bergmann, CFP®, EA, CLU, ChFC, Past National Board Member, FPA (ICFP)
“I learned more in those five days about financial planning and what it means to work with clients than in any other aspect of my educational journey toward my CFP certification exam. It was by far the most valuable investment I made in starting my career. Participating in Residency was the highlight and culmination of my educational journey and CFP certification exam. It was “Graduation Week” and a celebration of what meaningful and life-changing financial planning is all about. Over those five days the Residency experience brought the technical and procedural aspects of planning into focus – and the focus was centered on the client, your relationship with them, and how you present a relevant plan within the context of their financial life. Residency goes far beyond what is available in textbooks, seminars or the classroom. You must experience it first hand to justly grasp what it has to offer. The mentors were all beyond doubt committed to the program and attendees. Their investment in time, experiences shared, and passion toward the profession was priceless. The opportunity to share such quality time with the leaders of our profession was career changing and worth the cost of admission.”

Mark Shull
The Wealth Fitness Group, LLC
Lake Arrowhead Residency Experience
2008 Graduate

“The FPA Residency Program was a game-changing experience for me. Prior to the program, I had an understanding that there was more to being a financial planner than financial expertise, but the Residency Program provided me with the framework to adjust my mentality toward what is truly important to our clients and reconsider the way we deliver our advice to real-life people. I met a lot of great colleagues and mentors through the program that continue to be a part of my support network today.”

Joe Pitzl, CFP
DePaul Residency Experience
2006 Graduate

“I firmly believe that my experience at Residency helped to shape my career. The Residency Program gave me insight into what it meant to be a financial planner, mentoring me on my communication style, and helped show me how to better prepare myself to build lasting relationships with clients. While I receive a lot of mentoring within my own firm, branching out to get varied points of view on my chosen profession was instrumental in helping me form my unique path and skill set. We talk a lot in our firm about the three facets of planning and their interdependence: knowledge, application, and communication. While many financial planning degree programs, and the CFP Board of Standards education programs, focus on the knowledge, with a nod to application, there is very little out there to hone communications skills. It is in this that the FPA Residency Program can really pay off! Being able to communicate with clients at a high level, and deliver news – good and bad – is an essential skill that takes years of practice. The feedback and coaching I received at Residency made an immediate difference in my interaction with clients and colleagues. One of the unexpected results of my Residency experience was the impact it had on my professional involvement. Seeing the dedication and skill of those who surrounded me, both Residents and Mentors alike, really helped to energize me and reinforce my desire to be part of the financial planning profession. In the time that has passed I have become more active in leading the profession forward, first in the leadership of NexGen, an FPA Community of Interest full of vibrant young planners, and now on the FPA National Board of Directors. The Mentors’ dedication to ensuring a positive experience, and connecting with each resident on a personal level, fostered an open and safe learning environment. The connections and friendships forged in this intimate setting are everlasting; I still enjoy seeing many of my fellow residents, and the mentors that dedicated their time to helping us, today. It is my sincere belief that attending the FPA Residency Program will make a difference for EVERY financial planner, and know that our profession would benefit greatly if more planners had access to this incredible program!”

Michael A. Branhm, CFP
Chairman, Past President FPA NexGen
Current Member National Board of FPA
Lake Arrowhead Residency Experience
2004 Graduate

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