

Integrating the art and science of financial planning

Members share and create the value of Retreat

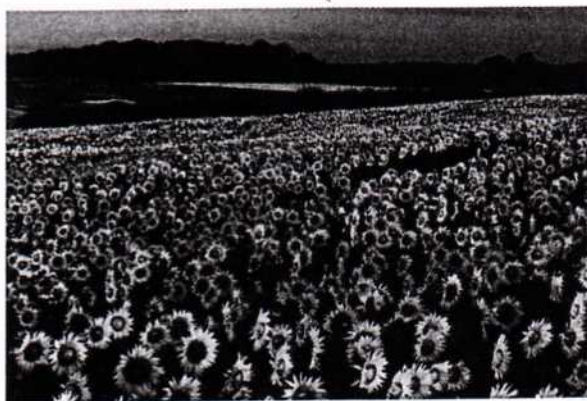
Retreat 2003 offers about a dozen hours of continuing education (CE) credit, but attendees of previous Retreats claim the education happens nearly around the clock. Certainly, the formal presentations deliver outstanding information on timely (or even ahead-of-their time) topics, but folks can't stop talking about the collegial exchange among participants during meals, in study groups and in tightly focused Under the Trees sessions (small discussion groups focused on self-selected topics).

On page 21 you'll find highlights of what's planned for July's Retreat 2003, but for now read about the rewards that other FPA members — from the U.S. and Europe — say they've received from participating in earlier Retreats.

"I'm in my 60s and I've been to a lot of meetings in my life," said William Topkis, ChFC during a conversation after Retreat 2002. "Far and away it was much more valuable than any meeting I've attended. It was a revelation for me."

Topkis said it boiled down to the caliber of people attending, the ongoing exchange of ideas, and insight to challenges he faced at Topkis & McDermott, LLP, in Wilmington, DE. "Most of the leading planners in the country were there. The quality of the people there were the best of the best. The sharing of ideas, the informality in order to talk with everyone, is just great."

The small size of Retreat allows easy interaction with others, according to Topkis. "You got as much out of sitting next



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to someone as the sessions themselves. One Under the Trees session focused on the paperless office, and I got an idea of a consultant we needed to talk to and initiate that process. I also met Nancy Langdon Jones and bought her book on mentoring financial planners — I'll stay in touch with her as I bring my daughter along into the firm."

For Barbara Fleming, CFP, of Wilmington, NC, the openness of attendees to discuss specific — and even proprietary — details of their practice impressed her. "One of the things that got to me was a small group conversation about how other people run their practice. They were willing to share their conflicts, and details of how they operate their business.

"It's really the people you're meeting that are the important

thing, rather than the resort amenities you can't use because you're so involved in discussions!" she concluded with a chuckle.

Italy's Maurizio Capra has attended five Retreats and said the benefits are that "You see things from a different angle and learn to think out of the box. Issues are different between Italy and the U.S. — taxation and healthcare for example — but when it comes to the direct relation with your client, the issues are more similar.

"I attend Retreat for the more intimate character of the conference and the possibility of making new friends. Today, I know at least one third of the people attending. And one of the