



## NEWSLINE OCTOBER 2014

### IN THIS ISSUE

- [· Our Next Meeting](#)
- [· President's Message](#)
- [· Jo Lynne Hutchinson Retirement Party](#)
- [· Financial Planning Day](#)

### RECENT JOB POSTINGS

#### Certified Financial Planner®

Widely recognized as one of New York's top venture-backed startups and a disruptive player in the personal finance industry, LearnVest is an award-winning subscription-based

**No October Chapter Meeting**  
**Save the Date for Our November Meeting:**  
**Wednesday, November 19th**  
**2:30-5:00 at the Phoenix Country Club**

Matt Neubert, Arizona Director of Securities on 'Updates on Securities Enforcement and

Thanks to Our Chapter Partners  
Platinum



*Own your tomorrow™*

◆ **COLE** ◆  
REAL ESTATE INVESTMENTS®



program designed to help people make progress on their money. [\(continued\)](#)

## Financial Advisor

StoneCrest Wealth Management is looking for Financial Advisor(s) who [\(continued\)](#)

### ABOUT OUR CHAPTER

#### [. Board of Directors](#)

Regulatory Trends...along with Registration and Compliance'

and

Attorney Alan Baskin on '1001 Ways to Avoid an Arbitration or Regulatory Proceeding'

**This session has been approved for 2 hours of CFP continuing education.**

Detailed session descriptions and registration to follow.

## President's Message

In the June President's Message, I highlighted some of the [\(continued\)](#)

## Jo Lynne Hutchinson Retirement Party

The big news is that Jo Lynne is retiring as our Executive Director at the end of the year. There will be a retirement party at Phoenix Country Club on Tuesday, December 2nd from 5-8 PM. To find out more and to register, please visit:

[JLH.WildApricot.org](http://JLH.WildApricot.org)

## Financial Planning Day - Volunteers Needed

On Saturday, October 24 from 9:00 a.m. til 1 p.m., our Chapter will partner with the City of Phoenix in providing *Pro Bono* financial advice to Valley residents.

The program will be held at the Pecos Senior Center , 17010 S. 48<sup>th</sup> Street (west of I-10 at Chandler Blvd. ).

To volunteer, please register at [www.financialplanningdays.org/phoenix](http://www.financialplanningdays.org/phoenix) or email me at [garycroatt@aol.com](mailto:garycroatt@aol.com)

Gary Croatt CFP®

**Walton™**  
APPRECIATE THE LAND

Gold

 **BANK OF ARIZONA**



Silver

 **Cetera®** | ADVISOR NETWORKS

 **LEARNVEST™**  
PLANNING SERVICES

 **PENSION STRATEGIES, LLC**  
QUALIFIED PLAN DESIGN & ADMINISTRATION

Director of Public Awareness

---

Copyright © 2014 FPA of Greater Phoenix. All rights reserved.  
Contact email: [info@fpaofphoenix.org](mailto:info@fpaofphoenix.org)

You are receiving this message because you opted in at [www.fpaofphoenix.org](http://www.fpaofphoenix.org)

[Unsubscribe](#)