

8-9-2016

SB-16F-3037: The Financial Planning Association

Student Government Association University of North Florida

Follow this and additional works at: <https://digitalcommons.unf.edu/sgaleg>



SB-16F-3037: The Financial Planning Association

- 1
- 2 Whereas: The Student Government of the University of North Florida was established to represent student
3 concerns in all University wide matters, and;
- 4 Whereas: The Budget and Allocations Committee is a standing committee of the Student Government
5 Senate, responsible for funding only those entities that comply with the Student Government
6 mission, which is to represent student concerns in all university wide matters while developing
7 and promoting programs and activities of practical value and interest to students, and;
- 8 Whereas: RSOs and currently enrolled Activity and Service Fee-paying students may request funding for
9 travel from the Student Travel Index according to chapter 841.1 of the Student Government
10 Statutes and;
- 11 Whereas: According to chapter 841.2 of the same, Travel Requests fall under the jurisdiction of the Budget
12 and Allocations Committee and are not subject to full Senate approval unless vetoed by the
13 President or brought to the Senate floor as outlined in Chapter 840.10 and according to 841.2,
14 and;
- 15 Whereas: The request must receive a two-thirds (2/3) affirmative vote to pass, and;
- 16 Whereas: The purchase or activity reflects students' genuine interests and enhances the educational, social,
17 cultural, and recreational services available to students at the University of North Florida, and;
- 18 Whereas: The person(s) listed below are Activity and Service Fee-paying students, who seek to manifest the
19 above mentioned goals, and;
- 20 Whereas: Four students from The Financial Planning Association wish to attend The FPA-BE Conference
21 in Baltimore, Maryland from September 13 to September 15, 2016, and;
- 22 Whereas: The Financial Planning Association is requesting funding for the below items:
- | | | |
|----|----------------|-------------|
| 23 | Registration | = \$796.00 |
| 24 | Lodging | = \$0.00 |
| 25 | Transportation | = \$1204.00 |
| 26 | Total | = \$2000.00 |
- 27



SENATE LEGISLATION

SB-16F-3037

1
2
3
4
5
6


SB-16F-3037: The Financial Planning Association

Therefore: Let it be enacted, by the University of North Florida Student Government, that \$2000.00 be encumbered in the FY 2016-2017 Student Travel Index 402028 in order to pay for the above referenced items.

Legislative Action

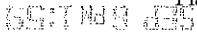
Executive Action

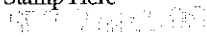
Author: B&A Committee
Sponsor: Senator Beaucham
Committee: B&A Committee
Committee Action: Approved 7-0-0
Senate Action: N/A
Date of Action: N/A

Let it be known that SB-16F-3037 is hereby
APPROVED / VETOED / LINE-ITEM VETOED
on this 7 day of September, 2016.
Signed: 
Caleb Grantham Student Body President

Signed and Delivered to the Student Body President
on this 6 day of Sep., 2016.

Signed and Delivered to the Senate Secretary

Place Time Stamp Here


Place Time Stamp Here


Signed: 
Dallas Burke, Student Senate President

Student Government Travel Request Check if travel funds were approved through CBC
 for Registered Student Organizations (RSOs)

DATE / TIME STAMP

08/05 AM 11:57

(REQUESTOR'S SIGNATURES)

DATE / TIME STAMP

(SG SIGNATURES)

RSO Name: Financial Planning Association (FPA)

Contact Name: Frank Sykora

Phone: 904-525-4057 Email: n01052061@ospreys.unf.edu

Advisor Name: Schnusenberg, Oliver

Phone: (904) 982-6070 Email: oschnuse@unf.edu

Purpose of Travel Request: Conference Meeting Workshop
 Seminar Competition Other:

Requested Event: FPA-BE Conference

Event Location: Baltimore, Maryland

Departure Date & Time: September 13, 2016 6:00 a.m.

Return Date & Time: September 15, 2016 5:45 p.m. 11:48 p.m.

Total Amount Requested: Maximum allowed; however, the total costs is \$2,000. \$2,000

Completed travel request packet must be submitted a minimum of five (5) weeks prior to travel. If travel funds were approved through CBC, the completed travel request is due three (3) weeks prior to travel.

Complete and attach the following. Failure to do so will negate the request.

- Cost breakdown spreadsheet documenting total amount of the trip and total amount of the request.
- Official schedule/agenda/program and other supporting documentation regarding purpose of travel.
- Official business price quotes for accommodations, transportation, registration fees, and other expenditures.
- Completed standard questionnaire with fundraising information.
- Tentative list with the names of all UNF students traveling, including N-numbers, addresses, phone numbers, and email addresses. - on file in Business Office
- Signed Statement of Travel Guidelines

Once reviewed by the SG officials, the requesting organization will receive a copy of the fully executed request. ~~The requesting organization will be required to submit fifteen (15) copies of this form and all required attachments to the Budget & Allocations Committee Chair prior to the next scheduled Budget and Allocations meeting.~~

To be completed by the Budget & Allocations Committee Chair

(Consider the following to be your official notification of dates and times, which are subject to change):

Date and time of Budget & Allocations Committee hearing: August 22, 2016 @ 5:30 pm

By submitting this form, requestor assumes responsibility for this trip and affirms that all funding allocated by the Student Senate will be used in compliance with the Student Government Finance Code (Title VIII of SG Statutes).

<u>Roberto Trizarry</u>	<u>08/04/16</u>	<u>[Signature]</u>	<u>8/19/16</u>
Club President's Name	Date	Senate Sponsor's Signature	Date
<u>[Signature]</u>	<u>08/04/16</u>	<u>[Signature]</u>	<u>August 10, 2016</u>
Club President's Signature	Date	Budget & Allocations Committee Chair's Signature	Date
Frank Sykora	<u>8/4/16</u>	<u>[Signature]</u>	<u>8/12/16</u>
Club Treasurer's Name	Date	Student Government Treasurer's Signature	Date
<u>[Signature]</u>	<u>8/4/16</u>	<u>[Signature]</u>	<u>8/15/16</u>
Club Treasurer's Signature	Date	SG Business Manager Signature	Date
Oliver Schnusenberg	<u>8/4/16</u>		
Advisor's Name	Date		
<u>[Signature]</u>	<u>8/4/2016</u>		
Advisor's Signature	Date		
	<u>8/4/2016</u>		

Any student with a disability who requires reasonable accommodations to participate in any program or activity funded by Student Government must first be registered with the UNF Disability Resource Center. Written requests for reasonable accommodations should be sent to the Director of the UNF Disability Resource Center.

Student Government Travel Request
for Registered Student Organizations (RSOs)

Travel Request Cost Breakdown Spreadsheet

UNF Student Government

Total Amount of the Trip		Total Amount of the Request	
Registration:		Registration:	
\$ per student	\$ 199.00	\$ per student	\$ 199.00
# of students	4	# of students	4
Total(R)	\$ 796.00	Total(R)	\$ 796.00
Lodging:		Lodging:	
# of students	4	# of students	4
# of rooms	2	# of rooms	2
# of nights	2	# of nights	2
\$ per room per night	\$ 250.00	\$ per room per night	\$ 0.00
Total(L)	\$ 1,000.00	Total(L)	\$ 0.00
Transportation:		Transportation:	
Vehicle Rental:		Vehicle Rental:	
# of vehicles		# of vehicles	
\$ per vehicle		\$ per vehicle	
Subtotal for rental	\$ 0.00	Subtotal for rental	\$ 0.00
Fuel:		Fuel:	
# of vehicles		# of vehicles	
# of miles per vehicle / 15 mpg		# of miles per vehicle / 15 mpg	
\$ per gallon		\$ per gallon	
Subtotal for fuel	\$ 0.00	Subtotal for fuel	\$ 0.00
Airfare:		Airfare:	
\$ per ticket	\$ 380.00	\$ per ticket	\$ 301.00
# of students	4	# of students	4
Subtotal for airfare	\$ 1,520.00	Subtotal for airfare	\$ 1,204.00
Total(T)	\$ 1,520.00	Total(T)	\$ 1,204.00
Total Cost of the Trip	\$ 3,316.00	Total Cost of the Request	\$ 2,000.00

Fuel Calculation: (# of miles / 15 mpg) * \$ per gallon = cost per vehicle

Tentative List of students who will be attending the FPA convention

Name	n-number	contact
Frank Sykora	n-01052061	904-525-4057
Lacquana Dawkins	n-00006578	904-994-6655
Jeana Milligan	n-00155242	904-881-0724
Roberto Irizarry	n-00818469	623-444-0869

Student Government Travel Request for Registered Student Organizations (RSOs)

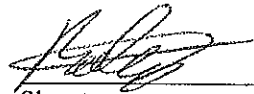
- 1) **Is the student organization currently registered and in good standing with Club Alliance? For how long have you been a registered student organization?**
Two years, Fall of 2014
- 2) **Will all students requesting funding be enrolled in classes during the time of the event?**
Yes
- 3) **Will the students be receiving a grade or academic credit for attending this event?**
No
- 4) **How many students in the organization have attended this event before?**
Three FPA Student Chapter members attended the FPA-BE Conference in Boston in 2015.
- 5) **How will attending this event benefit the individual students attending the event?**
The FPA-BE Conference is the most important national conference for CFP(TM) Professionals and for those seeking the CFP(TM) designation. The conference features cutting-edge topics in the financial planning industry delivered by professionals in the field. For
- 6) **How will attending this event benefit the UNF student body as a whole (what benefit will be brought back to the UNF campus)?**
The students returning from the conference will hold a session to share their experience at a club meeting which is open to anyone wishing to attend. They will incorporate many of the themes from the conference and networking with students from other student chapters.
- 7) **Have you received any other sources of funding for this trip? If yes, what other sources has this trip received funding from and how much was obtained?**
\$128, from raffle by the professional FPA. The FPA of Northeast Florida will also appeal to its members firms to provide additional funding.
- 8) **Have there been any fundraising activities held? If yes, what fundraising activities have been held and how much was raised?**
Two,
1. Chipotle fund raiser, \$80 2. Sporting event \$90 however, these funds exhausted.
- 9) **Has SG funded travel to this event before? If yes, how much did SG provide in funding?**
No
- 10) **What will happen if SG only partially funds this request?**
It will significantly impact the number of students who will be able to attend the event. As you may know, hotel rooms are the most expensive item for a multi night trip. Therefore, it makes sense to keep adding students as long as they can fit in the same room.;
- 11) **What will happen if SG does not fund this request at all?**
That would be very unfortunate, as the FPA Student Chapter would not be able to attend the conference in this scenario.

**STUDENT GOVERNMENT
STATEMENT OF TRAVEL GUIDELINES**

1. Upon approval of the Senate, you must meet with the SG Accounting Associate within three (3) business days to discuss internal procedures and funding arrangements. Failure to do so will result in loss of funding. *(Tip: it is recommended that you contact the Business & Accounting Office at 620-1511 the next business day and schedule an appointment.)*
2. Your travel must adhere to University Travel Policies published annually by the Travel Office.
3. All travelers must sign a TAR (Travel Authorization Request) and Liability Form no later than five (5) business days prior to trip departure date. You will be contacted by the SG Business and Accounting Office when the forms are ready for your signature.
4. Prepare an outline of the intended payment methods (i.e., who is paying for which expenses) and bring this information with you to your meeting with the Business & Accounting office.
5. Within two (2) business days of your return, original receipts must be turned into the SG Business & Accounting office. *(Tip: keep a copy of your receipts in the event you are contacted with questions about your submission.)*
6. University policy requires travelers to complete Travel Reimbursement (TR) forms at the conclusion of their travel, even if there is no reimbursement due. Once your TR is ready to sign, you will receive an email from the Business & Accounting office. It is important for you to make arrangements to sign the form within the time frame you are given in the email so not to jeopardize your reimbursement or to risk possible holds on your student record.

I have fully read and understand the Travel Guidelines. I further understand that failure to comply with the above guidelines and those in the Student Government Finance Code; Title VIII of SG Statutes will result in forfeiting all Student Government funding for the trip and possible holds on student records.

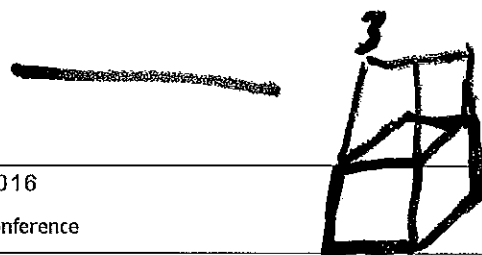
Roberto J. Irizarry
Student Name (Please Print)


Signature

08/09/16
Date



FULL SCHEDULE



TIME	TITLE
SUNDAY, SEPTEMBER 11, 2016	
4:00 PM - 6:30 PM	Quad-A Preconference
MONDAY, SEPTEMBER 12, 2016	
7:00 AM - 9:00 PM	Quad-A Preconference
9:00 AM - 7:00 PM	FPA Women and Finance Knowledge Circle Summit and Reception
TUESDAY, SEPTEMBER 13, 2016	
8:00 AM - 4:30 PM	Quad-A Preconference
8:00 AM - 7:00 PM	FPA Knowledge Circle Summit and Reception
WEDNESDAY, SEPTEMBER 14, 2016	
7:00 AM - 8:45 AM	CFP Ethics
7:00 AM - 7:00 PM	Registration Open
8:00 AM - 8:45 AM	Attendee Orientation
9:00 AM - 10:15 AM	Welcome & Opening General Session - "The Keys to Perseverance", Fireside chat with Cal Ripken, Jr.
10:15 AM - 10:30 AM	Break
10:30 AM - 11:30 AM	Advising Clients Through the Toughest Times of Life
10:30 AM - 11:30 AM	Best Practices Panel: Marketing Ideas in a Changing Practice Environment
10:30 AM - 11:30 AM	NexGen Mini Talks
10:30 AM - 11:30 AM	The Incredible Shrinking Alpha
10:30 AM - 11:30 AM	The Top 50 Insurance Planning Mistakes and How to Avoid (Fix) Them
11:30 AM - 12:30 PM	Lunch
11:30 AM - 12:30 PM	Lunch Discussion - Business Success Future Practice Management Concerns
11:30 AM - 12:30 PM	Lunch Discussion - Marketing Future Concerns
11:30 AM - 12:30 PM	Lunch Discussion - Networking Partnership Development
11:30 AM - 12:30 PM	Lunch Discussion - Practitioner Future Technical Concerns
11:30 AM - 12:30 PM	Professional Development Center Session
11:30 AM - 7:30 PM	Exhibit Hall Open
12:35 PM - 1:35 PM	Best Practices Panel: Factor Investing
12:35 PM - 1:35 PM	Business Rapid Fire
12:35 PM - 1:35 PM	Divorce Issues: The Non-Tax Side of the Coin

Leave Tuesday
Leave Thursday
maybe Friday.

982-6070

12:35 PM - 1:35 PM	Investing in Human Capital
12:35 PM - 1:35 PM	Year-End Income Tax Planning Opportunities
12:35 PM - 2:35 PM	Financial Planning Challenge - "How Do You Know?" Challenge
1:35 PM - 1:45 PM	Break
1:45 PM - 2:45 PM	Academic Research Presentation (JFP/AFS) Part 1
1:45 PM - 2:45 PM	Best Practices Panel: Technology
1:45 PM - 2:45 PM	Divorce: High Level Tax Implications
1:45 PM - 2:45 PM	Helrs Should Fear a Parent's New Marriage More Than Taxes
1:45 PM - 2:45 PM	Is Modern Portfolio Theory Dead? Portfolio Construction in Uncertain Times
2:45 PM - 3:00 PM	Break
3:00 PM - 4:00 PM	Best Practices Panel: Career Paths - Designing the Right Fit for You
3:00 PM - 4:00 PM	From Functioning to Flourishing: Applying Positive Psychology to Financial Planning
3:00 PM - 4:00 PM	Planning from the Inside Out
3:00 PM - 4:00 PM	So Now You are a Sole Practitioner! Making the Transition from the Firm Environment
3:00 PM - 4:00 PM	The Global Impact of Investing
4:10 PM - 5:10 PM	General Session - Human Finance
5:15 PM - 6:15 PM	Professional Development Center Session - Demystifying Smart Beta
5:15 PM - 6:15 PM	Roundtables - Global Investment Realities
5:15 PM - 6:15 PM	Roundtables - Growing Your Practice to the Next Level
5:15 PM - 6:15 PM	Roundtables - Practice Management and Marketing Issues for NexGen and Millennials
5:15 PM - 6:15 PM	Roundtables - Retirement Realities
5:15 PM - 6:15 PM	Roundtables - Suddenly Single (Divorce and Widow) Concerns
5:15 PM - 7:30 PM	Opening Reception
6:30 PM - 7:30 PM	Professional Development Center Session

THURSDAY, SEPTEMBER 15, 2016

6:45 AM - 7:45 AM	Breakfast
7:00 AM - 7:55 AM	Corporate Sponsored Breakfast Session - RBC
7:00 AM - 7:55 AM	Corporate Sponsored Breakfast Session - Ryan Insurance
7:00 AM - 7:55 AM	Corporate Sponsored Breakfast Session - TBD
7:00 AM - 7:55 AM	Economic and Market Update Sponsored By: Commonwealth Financial Network
8:00 AM - 9:15 AM	General Session - "Creating Long Term Value for Clients", Fireside chat with Brian Rogers

9:30 AM - 10:30 AM	Asset Protection Strategies: What Does and Doesn't Work
9:30 AM - 10:30 AM	NexGen Wiser Together Cafe
9:30 AM - 10:30 AM	Planning With Health In Mind
9:30 AM - 10:30 AM	Top 10 Social Media Strategies Used by Successful Advisors
9:30 AM - 10:30 AM	The Economics of Selling Your Business to Employees
10:30 AM - 10:50 AM	Break
10:30 AM - 7:00 PM	Exhibit Hall Open
10:50 AM - 11:50 AM	Academic Research Presentation (JFP/AFS) Part 2
10:50 AM - 11:50 AM	Adviser Evolution: Adapting to the New Age of Advice Sponsored By: Vanguard
10:50 AM - 11:50 AM	Assessing Which Retirement Plans Make the Most Sense for Your Clients
10:50 AM - 11:50 AM	How the Changing Face of Wealth Can Make You A Better Planner
10:50 AM - 11:50 AM	Learning From The Estate Planning of Deceased Celebrities
10:50 AM - 11:50 AM	Succession Planning Mistakes to Avoid
11:50 AM - 1:00 PM	Lunch
11:50 AM - 1:00 PM	Lunch Discussion - Business Success Future Practice Management Concerns
11:50 AM - 1:00 PM	Lunch Discussion - Marketing Future Concerns
11:50 AM - 1:00 PM	Lunch Discussion - Networking Partnership Development
11:50 AM - 1:00 PM	Lunch Discussion - Practitioner Future Technical Concerns
11:50 AM - 1:00 PM	NexGen Town Hall
12:00 PM - 1:00 PM	Professional Development Center Session - American Funds
1:10 PM - 2:10 PM	Global Update
1:10 PM - 2:10 PM	Long Term Care Planning - Financial, Emotional, and Real World Decisions
1:10 PM - 2:10 PM	Management and Ownership: Separate Realities
1:10 PM - 2:10 PM	TBD
1:10 PM - 2:10 PM	Using Trusts to Save State Income Tax
2:10 PM - 2:25 PM	Break
2:25 PM - 3:25 PM	Best Practices Panel: Succession Planning Realities from the Seller and the Buyer Perspective
2:25 PM - 3:25 PM	CFP Board Presentation
2:25 PM - 3:25 PM	Estate Planning for Non-Traditional Couples: After Windsor & Obergefell
2:25 PM - 3:25 PM	Social Security - Understanding How to Work the System

2:25 PM - 3:25 PM	Sponsored Session
3:25 PM - 3:50 PM	Break
3:50 PM - 4:50 PM	Digital Estate Planning
3:50 PM - 4:50 PM	Foundation for Financial Planning - Pro Bono Bootcamp
3:50 PM - 4:50 PM	Sponsored Session
3:50 PM - 4:50 PM	The Most Efficient Ways to Save and Pay for College
3:50 PM - 4:50 PM	Using Form 1040 to Identify Financial Planning Opportunities
4:50 PM - 7:00 PM	Cocktails
4:55 PM - 5:55 PM	Professional Development Center Session
4:55 PM - 5:55 PM	Roundtables - Diversity Planning Issues
4:55 PM - 5:55 PM	Roundtables - Estate Planning
4:55 PM - 5:55 PM	Roundtables - Insurance and Annuities
4:55 PM - 5:55 PM	Roundtables - Life! What's on Your Mind as a Financial Planner
4:55 PM - 5:55 PM	Roundtables - The Adviser's Guide in Hiring, Managing and Keeping Interns in Building Your Practice
6:00 PM - 7:00 PM	Professional Development Center Session
8:30 PM - 11:30 PM	FPA Annual Conference Party

FRIDAY, SEPTEMBER 16, 2016

6:45 AM - 7:45 AM	Breakfast
7:00 AM - 7:55 AM	Corporate Sponsored Breakfast Session
8:00 AM - 9:15 AM	General Session - What Is Your Ace of Spades, Eric Maddox
8:45 AM - 2:00 PM	Exhibit Hall Open
9:15 AM - 9:45 AM	Break
9:45 AM - 10:45 AM	Academic Research Presentation (JFP/AFS) Part 3
9:45 AM - 10:45 AM	Creative IRA Distribution Planning Ideas
9:45 AM - 10:45 AM	Cyber Security Research
9:45 AM - 10:45 AM	Post Election Regulatory Concerns
9:45 AM - 10:45 AM	Social Media and Compliance
11:00 AM - 11:55 AM	AFS Research Session
11:00 AM - 12:00 PM	Cyber Security Issues in Financial Services: How to Stay Protected
11:00 AM - 12:00 PM	The Certainty of Uncertainty: How the DOL Fiduciary Ruling Can Help You Transform Your Business
11:00 AM - 12:00 PM	The FPA Media Panel: What Journalists Look for in Sources and Stories
11:00 AM - 12:00 PM	Watching Out for the IRS
12:00 PM - 1:00 PM	Lunch
1:00 PM - 3:00 PM	CFP Ethics



[Register Now](#)

Register

	Early Bird (Ends June 24)	Advance (Ends July 29)	Regular (Ends Sept. 14)
Member	\$799	\$899	\$1,099
Nonmember	\$999	\$1,099	\$1,299
Students	\$199	\$199	\$199

Online Registration for the FPA Annual Conference – BE Baltimore 2016 is Live!

Register now for the 2016 FPA Annual Conference. If you encounter any problems with the online registration process, please call a member services representative at 800.322.4237. Please note, if you do not have an FPA login you will need to create one in order to register for the conference.



Day Passes Available!

	Sept. 14	Sept. 15	Sept. 16
Member	\$450	\$450	\$400
Nonmember	\$550	\$550	\$500
Students	\$150	\$150	\$125

Please call a member services representative at 800.322.4237 to register for all day passes.

Call Us!

If you would like to register over the phone, or have problems registering online, please contact a Member Services Representative at 800.322.4237.

Download and Fax

You can also register by [downloading the registration form](#) and faxing to Member Services at 303.759.0749.

Group Registration

Contact a Member Services Representative at 800.322.4237 to register your group over the phone. We can also

issue your organization an invoice to pay for your group all at once.

FPA Diversity Scholarship

The FPA Diversity Committee developed a merit-based scholarship to sponsor attendance to the FPA Annual Conference. Scholarship award winners receive one-year FPA membership, conference admission, chapter dues and conference travel expenses. Learn more about the [FPA Diversity Scholarship](#) and [apply now!](#)

Cancellation/Refund Policy

Cancellations must be made in writing. All refunds are based on U.S. dollars and postmark date of written request. Cancellations postmarked on or before August 19, 2016, receive a full refund less a \$100 processing fee. No refunds are given after August 19, 2016.

FPA reserves the right to deny or revoke registration for any individual or firm wishing to attend any FPA event. Attendees who register at any FPA event for the purpose of soliciting business from other attendees and/or exhibitors without registering as exhibitors will be ejected from the event immediately with no refund of any paid fees or expenses.

Accommodations

Please make your hotel reservation through FPA. Staying within our designated hotel room block allows us to keep your registration costs low and continue to negotiate competitive room rates for all attendees.

Photography and Videography

FPA reserves the right to video tape and/or photograph sessions, events and attendee activities at FPA's Annual Conference – BE Baltimore 2016 to be potentially used in future marketing and collateral material.

Privacy Policy

By registering for this FPA event, you are opting in to receive communication from conference sponsors. To manage your communication preferences, login to your [FPA profile](#), call FPA at 800.322.4237, or e-mail [Member Services](#).

Safety Policy

Possession of guns, knives or other weapons, as well as unauthorized possession of alcohol and/or other controlled substances, will result in ejection and forfeiture of any paid fees or expenses. Anyone who impedes pedestrian traffic, breaks applicable federal, state, or local laws, violates rules and regulations imposed by the conference facility or FPA, or who threatens or endangers other individuals will be ejected from the Event immediately with no refund of any paid fees or expenses.

Questions

Please call your dedicated FPA Member Services Advocates at 800.322.4237, option 2, or feel free to send an [e-mail](#).