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Strategic Growth Plan: An Update

(As of June 19, 2015)

The following responses by FSP to questions posed to participating organizations for the 2015 Joint Executives Committee Meeting serve as a concise update on the Society's Strategic Growth Plan.

1. What is your association's "why?"

FSP exists to help financial service professionals deliver the highest level of service to their clients.

FSP provides financial advisors from multiple disciplines the capability to intersect, build strong relationships and grow in terms of both professional expertise and productivity.

2. What is your strongest member benefit?

Our strongest benefit is represented by FSP's ability to provide the following:

- a. Cultivating mutually beneficial relationships among credentialed financial service professionals
- b. Establishing the highest standards of ethical conduct
- c. Delivering top quality continuing education programming

3. What is your biggest challenge and strategy for addressing it?

Our members are credentialed advisors, attorneys, CPAs, insurance experts and other financial professionals in local chapters across the country.

With 110 chapters, our critical focus is on assisting chapters to uniformly and effectively deliver top-notch professional education and build a rewarding environment that fosters the growth of valuable professional relationships among a diverse membership population.

Our strategy is based on national FSP providing "Chapter Success Services" in three areas:

- a. Simplify running the chapter
- b. Building quality membership
- c. Helping with program and event support

4. Looking ahead, what does your association look like in 5 years?

We expect:

- a. All of our chapters to be fully capable of delivering highly valued programming in a setting that promotes and enables the development of worthwhile professional relationships among a multidisciplinary population of members
- b. That our membership has become younger and substantially more diverse from a professional and multi-cultural viewpoint
- c. Overall, that our membership has grown by at least 25% (or approximately 5% per year)