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CFP BOARD REPORT

News from Certified Financial Planner Board of Standards, Inc.

We've
moved!

Please note CFP Board's new
contact information:

1425 K Street, NW, Suite 500
Washington, DC 20005

P: 800-487-1497

F: 202-379-2299

E: mail@CFPBoard.org

October 2008

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☉ CHAIR'S MESSAGE

On behalf of all of us at CFP Board, I'd like to thank the thousands of CFP® professionals who took time to complete CFP Board's first "Pulse" survey. The [results of the pulse survey](#) speak well of our work to help Americans chart a course to reach their goals. Results showed that 78 percent of the clients of

by the many CFP® professionals who are engaged in their own efforts to reach national and local media with the message of the benefits of financial planning and working with a CFP® professional. We appreciate all of you who help further awareness of CFP® certification across the country through your media contacts and your involvement in your communities.

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Accomplishments of CFP® Certificants

CFP Board congratulates the following CFP® professional on his professional activities and accomplishments:

Donald J. Settina, CFP®, President and CEO of Financial Service Standards, LLC, a national 401(k) training organization headquartered in Pittsburgh, for being honored with a 2008 Signature Award from the Profit Sharing/401k Council of America (PSCA). The annual PSCA Signature Awards recognize excellence in plan communication and investment education in 401(k) plans.

CFP Board welcomes information about the activities and accomplishments of CFP® professionals. If you have information you would like to share with CFP Board, please contact us at mail@CFPBoard.org.

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⊕ UPCOMING CFP BOARD EVENTS

- [Ethics Webinar, November 5, 2008](#)
- [Financial Planning Clinic, November 15, 2008, Miami, FL](#)
- [Business Update Webinar, November 17, 2008](#)
- [Ethics Workshop for Compliance Officers, November 20, 2008, Chicago, IL](#)
- [2008 Firm Meeting, December 5, 2008, Washington, DC](#)

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⊕ WHAT'S NEW ON CFP.NET

- [Results of Pulse Survey: CFP® Certificants Share Views of Current Economic Situation](#)
- [Video review of recent Financial Planning Clinic in Washington, DC](#)
- [Updated Tax Tables for November 2008 CFP® Certification Examination](#)

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⊕ OPPORTUNITIES

Final Preparations Underway for CFP Board's Financial Planning Clinic in Miami