

Date: _____

FPA-NY “Speakers and Scribes” Questionnaire

Please complete this form if you would like to be considered as a potential speaker or scribe at FPA’s public educational meetings or as a source for media interviews and/or bylined articles. Fax to Hedda Nadler, (212) 371-0787 or mail to: Mount & Nadler, Inc., Attn: Hedda Nadler, 425 Madison Ave., Suite 1600, New York, NY 10017.

Name & Designation/s: _____

Company: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Cell: _____ Fax: _____

E-Mail: _____

What foreign languages do you speak **fluently**: _____

- Are you a financial planning practitioner? Yes ___ No ___
- Do you have media (print and/or broadcast) experience? Yes ___ No ___
 (if yes, please **attach a listing of experience and topics**)
- Do you do public speaking? Yes ___ No ___
 If yes, on what topics? _____
- Indicate which of the following you would like to be considered for:
 media interviews _____ writing articles _____
- Would you be willing to **include your clients** for stories and/or broadcast appearances? (We often receive media requests for sources with **their clients**.) Yes ___ No ___
- Which of the following groups would you be interested in speaking to?
 Consumers ___ Professionals ___ Employees ___ Children ___ Other (please be specific)

- Describe your typical client as specifically as possible:

- What other interests/hobbies do you have? And, do you share these experiences with your clients?

Please circle the #'s next to your areas of expertise on the reverse side and return with your biographical information and photo to the address shown above.

S&S Questionnaire Expertise List -- circle maximum of 5 #'s next to subjects that match your expertise:

- 1 Annuities
- 2 Asset allocation (investment planning)
- 3 Asset management (professional portfolio management, separate accounts)
- 4 Asset protection (off-shore trusts)
- 5 Banking (investment banking, mortgage banking)
- 6 Broker-Dealer (due diligence)
- 7 Budgeting & debt management
- 8 Business planning (CHBO's, large/small business, family, buy/sell agreements)
- 9 Charitable and Planned Giving (donor advised funds)
- 10 Commodities
- 11 Corporate finance
- 12 Divorce (pre and post planning)
- 13 Economy (trends and indicators)
- 14 Education planning (college and private school funding)
- 15 Elder Issues (long-term care, pre-mortem planning)
- 16 Employee benefits (qualified plans, defined contributions, 401(k's), 403(b)'s)
- 17 Estate planning (transfer of wealth, trusts, lump-sum payments)
- 18 Ethics/compliance
- 19 ETIF's, Index investing
- 20 Fee-based planning and/or conversion to fee-based
- 21 Financial Planning for: executives, lawyers, medical professionals, athletes, elderly (circle those that apply)
- 22 General financial planning
- 23 Government and military clients
- 24 Insurance (life, health, DI, long term care)
- 25 Insurance (P & C, E & O)
- 26 International investments
- 27 IRA's (Roth, SEP, Contributory)
- 28 Irregular income planning (commissions, income from stocks & bonds)
- 29 Limited partnerships (oil & gas, real estate, mineral rights)
- 30 Market Trends (stock market, investment trends)
- 31 Medical and health issues (costs, Medicare/Medicaid, terminally ill AIDS)
- 32 Mortgages
- 33 Mutual funds
- 34 Non-traditional households - planning for (same-sex & unmarried couples)
- 35 Non-US, citizens - planning for (single or married to a U.S. citizen)
- 36 Personal development (motivational, working with a coach)
- 37 Practice management (marketing, sales tips, staff issues, building a practice, financial aspects, going paperless)
- 38 Real Estate
- 39 Retirement planning (lump-sum settlements, pension, early and pre/post retirement)
- 40 Reverse mortgages
- 41 Risk & personality profile analysis
- 42 Social Security issues
- 43 Stock options
- 44 Stocks and Bonds
- 45 Succession planning for self and/or clients
- 46 Tangible assets (rare coins, art, collectibles)
- 47 Tax preparation (CPA's, EA's)
- 48 Technology (hardware, software)
- 49 Women's issues (divorcees, widows, married w/separate assets, single mothers)