

NexGen SIGN-UP SHEET

Contact Information

Last Name: _____

First Name: _____

Business Name: _____

Phone: _____

Street Address: _____

Fax: _____

City/State/Zip: _____

E-Mail: _____

Practice Information

Years of Experience: _____

Position/

Responsibilities: _____

Personal Information

Age: _____

of Planners in Practice: _____

I am currently a CFP® designee

I am currently working to attain my CFP®

I am currently 36 years old or younger

I will commit at least 5 acts of honoring a predecessor each year (however I choose)

I am a member of FPA

I am a CFP® certificant or enrolled in a program

I am employed or seeking employment in a financial planning capacity

I desire to be actively involved in advancing the financial planning profession

I will keep all conversations confidential to this group unless otherwise agreed

I will participate, support, and encourage

I will share my experiences that others may learn from them

I will aid in promoting agreed messages through various outlets

FULL MEMBER

Check all criteria

AFFILIATE MEMBER

Check above criteria you agree to abide by and qualify for

I agree to all of the above, signed:

I agree to the criteria marked above, signed:

I do not meet one or more of the above criteria, but still want to be involved as an associate member. I am unable to hold leadership positions or vote, but may still be involved in the community as it develops. I realize that my membership is contingent upon acceptance by NexGen leadership.

Please fill in as completely as possible. If there is any other information or detail you believe pertinent, please add it where appropriate, or on back and circle here.

Info on back

NexGen Group Information

Vision Statement

“To ensure the transference of wisdom, tradition, and integrity, from the pioneers of financial planning to the next generation of our profession”

Mission Statement

NexGen is intended to be a community of the next generation of financial planners.

Our main purposes are to:

- Support, advise, and encourage one another in our professional advancement.
- Promote, foster, and direct programs that aid in passing the baton.
- Explore issues common to younger planners and seek means of accentuating the positives and finding resolutions for the negatives.

Full Member Agreement*

I am currently 36 years old or younger, when joining
I will commit at least 5 acts of honoring an industry predecessor each year
I am a CFP® certificant or enrolled in a program
I am a member of FPA
I am employed or seeking employment in a financial planning capacity
I desire to be actively involved in advancing the financial planning profession
I will keep all conversations confidential to this group unless otherwise agreed
I will participate, support, and encourage
I will share my experiences that others may learn from them
I will aid in promoting agreed messages through various outlets

Activities/Resources

Message Board: E-mail steveh@legacywealth.com to begin enrollment.
Annual Conference: FPA NexGen 2007, at St. Cloud, Minnesota July 20-22, 2007
Meetings at FPA Conferences and Retreats
Activities with Rat Pack

*Affiliate Membership is available to those not meeting all above qualification criteria on approval of leadership from submission of membership form.

NexGen - Yahoo! Board Group Rules

NexGen Vision Statement

"To ensure the transference of wisdom, tradition, and integrity, from the pioneers of financial planning to the next generation of our profession."

NexGen Mission Statement

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Our main purposes are to:

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Purpose:

The purpose of the NexGen – Yahoo! Online Group Rules is to establish requirements for Yahoo! Online Group member's participation, identification and conduct online in order to help achieve, support and promote the NexGen Vision and Mission Statements. **Your continued participation in the NexGen Yahoo! Online Group after 05/01/07 is your agreement to abide by the rules below.**

Member Participation:

The following are requirements for participation in the Yahoo! Online Group.

- Be a Full or Affiliate Member of NexGen (Sign Up Sheet Completed and Approved).
- You create a free Yahoo! ID identifying yourself. You apply or are invited to join the group.
- Introducing yourself to the group and providing a brief background is strongly encouraged.
- You agree to abide by the member identification and conduct requirements below.

Member Identification:

As a member of the NexGen Yahoo! Online Group, you are required to identify yourself in at least one of three ways when corresponding with Members online. All three methods are preferred.

- A descriptive Yahoo! ID and Yahoo! email address.
- Your Yahoo! Profile should include your name and contact information.
- Including a "Signature" with your name and contact information in your correspondence.
- You are encouraged (not required) to add a picture of yourself to put a face with your name and help members recognize you at the NexGen conferences as well as other FPA conferences.

Member Conduct and Removal:

In order to maintain participation in the Yahoo! Online Group, you agree to help achieve, support and promote the NexGen Vision and Mission Statements as well as abide by the Yahoo! Terms of Service, specifically Item #6 regarding Member Conduct (see below). Once NexGen Officers determine that a Member is not adhering to these conduct requirements or the spirit of the NexGen Vision and Mission Statements, an email will be sent to the Member from a NexGen Officer warning of the behavior and, upon similar conduct after the warning, NexGen Officers reserve the right to remove the Member from the Yahoo! Online Group and potentially from NexGen.

See Member Conduct Item #6: <http://info.yahoo.com/legal/us/yahoo/utos/utos-173.html>