

Student Financial Planning Association at The Ohio State University



**Student Financial
Planning Association**

at The Ohio State University

**Wednesdays from 5:30 p.m.—6:30 p.m.—Campbell Hall Room 243 and
Online Zoom Session**

Registration Link: <https://osu.zoom.us/meeting/register/tJItcuCvrTkoEttfcVhTGKvJ6P5IqgjON1RGt>

Website: org.osu.edu/SFPA

President: Kennedy Coey (Coey.26@osu.edu) & David DeSalvo (DeSalvo.23@osu.edu)

Vice President: Anthony Bruno (Bruno.152@osu.edu)

Social Media Coordinator: Evan Akers (Akers.150@osu.edu)

Treasurers: Jack Wheeler (Wheeler.1177@osu.edu) & Jack Faust (Faust.100@osu.edu)

Secretary: Joel Potts (Potts.327@osu.edu)

Autumn 2021 SEMESTER SCHEDULE:

September 1: Introduction to the Financial Services Industry

Learn about careers, compensation, licenses & certifications, internships and more with our Advisor, Paul Dolce, CFP.

September 15: Recent Grad Panel & CFP Exam

Recent OSU alumni will share their experiences in the financial planning field and answer any questions about taking the CFP exam.

September 29: Tax Planning

A local CFP, along with our Advisor, Paul Dolce, will share some of the advice and strategies that they use with clients to manage their tax bill.

October 27: Technology Stack: eMoney

Learn about eMoney, a financial planning software that many financial planners utilize in their practice. There will be a demonstration that shows how all of a client's financial data can be transformed into a comprehensive financial plan.

November 10: Estate Planning

An estate planning attorney will share some of the strategies used for clients as well as what documents clients might need.

December 1: Mock Client Meeting

A local financial planner will facilitate a mock client meeting to give an in-depth look at what types of advice planners give and what questions clients may ask during the financial planning process.