

Student Financial Planning Association

at The Ohio State University



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Planning Association**

at The Ohio State University

Wednesdays from 5:30 p.m. — 6:30 p.m.
in Campbell Hall Room 251
Website: org.osu.edu/SFPA

Presidents: Anthony Bruno (Bruno.152@osu.edu) & Jack Faust (Faust.100@osu.edu)

Vice President: Joel Potts (Potts.327@osu.edu)

Treasurer: Grant Van Winkle (Vanwinkle.63@osu.edu)

Secretary: Michael Chojnacki (Chojnacki.16@osu.edu)

Social Media Coordinator: Gia Globokar (Globokar.4@osu.edu)

Events Chair: Nick Augenstein (Augenstein.51@osu.edu)

Recruitment Chair: Rachel Perry (Perry.2366@osu.edu)

Advisor: Kevin Clark (Kevin@archcitytax.com)

FALL 2022 SEMESTER SCHEDULE

September 7: Introduction to the Financial Services Industry

Learn about careers, compensation, licenses & certifications, internships and more with our advisor, Kevin Clark, CFP.

September 21: Vanguard Internships and FADP

Hear from Daniel Suthers, the Financial Advisor Development Program (FADP) manager, about internship and career opportunities at Vanguard.

October 5: Estate Planning

Matt Gibson of Pappas Gibson LLC. will join us to discuss estate planning and asset allocation.

October 19: Retirement Planning & Software Demo (eMoney)

Summer Anderson, CFP will lead a demonstration of the financial planning software used by Summit Financial Strategies.

November 2: Resume Building Workshop

Network and meet with multiple companies and industry professionals who will review, critique, and help you improve your resume.

November 16: Financial Planning Case Study

We will walk through a comprehensive financial planning case using financial statements and planning software, and discuss how to deliver a financial plan.

November 30: Alternative Careers in Financial Services

A panel of professionals will talk about other possible career paths in the personal finance industry besides financial planning.