



FPA of Michigan 2024 Annual Symposium Post-Event Feedback Survey

Thank you for attending the FPA of Michigan 2024 Annual Symposium. Your feedback will help us to improve future Symposiums. Individuals who complete this survey will be entered in a drawing to win a "complimentary" registration to the FPA of Michigan 2024 Symposium.

For those sessions you attended, please rate the following by circling a number in the box:

Speaker/Presentation	Content	Relevance of Topic	Presentation/Delivery
Craig Lemoine <i>AI in Wealth Management & Financial Planning</i>	1 2 3 4	1 2 3 4	1 2 3 4
Apollo Lupescu <i>Value of Advice</i>	1 2 3 4	1 2 3 4	1 2 3 4
Jeff Concepcion <i>Learning Strategies – Buying/Selling Practice</i>	1 2 3 4	1 2 3 4	1 2 3 4
Craig Lemoine <i>Technology RoundTable</i>	1 2 3 4	1 2 3 4	1 2 3 4
Derek Archey/Brett Berg <i>Estate Planning in the Current Tax Environment</i>	1 2 3 4	1 2 3 4	1 2 3 4
Table topics <i>RoundTable Discussions</i>	1 2 3 4	1 2 3 4	1 2 3 4
Darren McCarty	1 2 3 4	1 2 3 4	1 2 3 4
Carlin Calcaterra <i>The Great Wealth Transfer</i>	1 2 3 4	1 2 3 4	1 2 3 4
Daniel Crosby <i>The Soul of Wealth: Where Money Meets Meaning</i>	1 2 3 4	1 2 3 4	1 2 3 4
Spencer Olson <i>Cost Containment Strategies/Future of Emp Benefits</i>	1 2 3 4	1 2 3 4	1 2 3 4
Sarah Kirkpatrick/Daniel Blauw <i>Planning for our Rising Special Needs Population</i>	1 2 3 4	1 2 3 4	1 2 3 4
Justin Castelli <i>Aligning Your Practice with Your Authentic Self</i>	1 2 3 4	1 2 3 4	1 2 3 4
Ruby Pediangco/Chris Boyce <i>Advanced Charitable Planning Best Practices</i>	1 2 3 4	1 2 3 4	1 2 3 4
Strider Elass <i>Coming Back to Reality</i>	1 2 3 4	1 2 3 4	1 2 3 4

Why did you attend this year’s Symposium: _____

Overall, how would you rate the FPA of Michigan 2024 Annual Fall Symposium?
 _____ Excellent _____ Very Good _____ Good _____ Fair _____ Poor

What types of speakers and topics would you like to see at future Symposiums? _____

Rank most to least important to you when choosing to attend this year's Symposium, with 1 being the most important. _____ Location _____ CE’s _____ Networking _____ Speakers/Topics

Which location would you like to see a future Symposium held? ___ Ann Arbor ___ Lansing ___ Metro Detroit

For 2025, would your preference be a one day or two day Symposium? ___ one day ___ two days

Have you participated in any FPA MI sponsored continuing education webinars in the past year? If so, please share your feedback on quality and relevance: _____

What topics or areas of expertise would you like to see covered in future educational events or workshops? _____

Have you attended any FPA networking events? If yes, how would you rate their effectiveness in facilitating meaningful connections?

○ ○ ○ ○ ○
Poor 1 2 3 4 5 Excellent

Are there specific ways in which FPA could enhance its member networking initiatives? _____

Are there any barriers preventing you from taking full advantage of FPA's professional development opportunities? If so, can you explain: _____

How could FPA further promote member engagement and collaboration within and across different segments of the profession? _____

How likely are you to recommend FPA membership to a colleague or peer?

○ ○ ○ ○ ○
Unlikely 1 2 3 4 5 Definitely

What factors influence your rating? _____

How likely are you to attend future FPA of Michigan Symposiums?

○ ○ ○ ○ ○
Unlikely 1 2 3 4 5 Definitely

Please share any additional feedback to help us improve future Symposiums (i.e., what worked well and what could we have done to make it better?): _____

Are you interested in learning more about joining a FPA MI Committee? If yes, please select your interest below:

___ Advocacy ___ Education ___ Membership ___ NexGen ___ Pro Bono ___ Women & Finance

As a thank you for completing this survey, please include your name and email address below and you will be entered into a raffle to win a "complimentary" pass to next year's symposium!

Name: _____

THANK YOU!