The Foundation for FSP hosted its fifth annual national Industry Issues Competition at the FSP Arizona Institute in Tempe, Arizona, on January 25, 2016. Teams of students from University Partner Program colleges and universities offered oral presentations on the topic, Career Opportunities: Evaluating Careers and Attributes for Success in the Financial Services Profession.

The team from Utah Valley University—Cody Ulland, Brittany Frampton, and Anna Vlasova—directed by Professor Lukas R. Dean, PhD, took first prize. “Our students did a great job focusing on the key issues of how to benefit personally and professionally from mentorship and from getting involved in a professional association,” said Dean.

There was a second place tie between the University of Missouri – St. Louis, with Christopher Shepard, Tamas Javor, and Omar Nassar, directed by Professor Gary L. Flotron, MBA, CLU, ChFC, AEP, and California State University, Northridge, with Evan Davis, Caroline Teixeira Bonelli, and Ashhad Khan, directed by Professor Inga Chira, PhD, CFP.

The Utah Valley University team won $5,000 in scholarship funds. The University of Missouri – St. Louis and California State University, Northridge, each took home $2,500 in scholarship funds for their schools.

Judging Panels

Oral presentations at the Arizona Institute were judged by: Richard M. Weber, MBA, CLU, AEP (Chair, Judging Panel), John K. Mulvey, Jr., CLU, ChFC, AEP; Tracy W. Oishi, CLU, ChFC, LUTCF; Michael G. O’Neill, CPA/PFS, CLU, ChFC; Thomas L. Petsche, CLU, ChFC, RHU; Ruth R. Petty, CLU, ChFC, MSM, MSFS, CASL; and Patricia A. Solberg, CFP, CLU, LUTCF, MSW.

Written presentations were judged by: James B. Lammers, CFP, CLU, ChFC (Chair, Judging Panel), James M. Christian, CLU, ChFC; April Caudill, JD, CLU, ChFC, AEP; R. Clifford Berg, CLU, ChFC, AEP, MSFS; Kevin D. Lindblom, CLU, ChFC, LUTCF; and Robert B. Wellendorf, II, CLU.

Special thanks to current Foundation for FSP Chair and Master of Ceremonies, James B. Lammers, CFP, CLU, ChFC (Chair, Judging Panel), James M. Christian, CLU, ChFC; April Caudill, JD, CLU, ChFC, AEP; R. Clifford Berg, CLU, ChFC, AEP, MSFS; Kevin D. Lindblom, CLU, ChFC, LUTCF; and Robert B. Wellendorf, II, CLU.

The Foundation for Financial Service Professionals is committed to both educational and community outreach projects, including: the Paul S. Mills Scholarship; The Kenneth Black Journal Author Award; Financial Education Partners; and the American Business Ethics Award. Contact Anne Rigney at arigney@financialpro.org.