



Take 5



February 2021

Report Available: First Year of the OneFPA Network Beta Test

Year two of the OneFPA Network beta test is underway and the OneFPA Transition Task Force wanted to shed some light on the progress made in 2020—the first year of the beta test. From cultural improvements to technology adoption, the report provides insight into the first 12-months of the process and key metrics that will guide our efforts in 2021. [Review the report.](#)

Become Fluent in FinTech

An increasing number of clients prefer doing business with firms that offer a mix of digital platforms and services. As a result, financial planners who are able to utilize fintech tools to help clients navigate complicated financial scenarios are more likely to succeed. To help you navigate this topic, FPA has rounded up information and resources to help you understand how the latest software, systems, big data and AI are impacting the financial planning process and firms. [Check out these resources.](#)

FPA Members Increased One-on-One Pro Bono Engagements by 7% in 2020

Despite the challenges COVID-19 presented in 2020, FPA members and chapters adapted to the new reality and ended the year with a 7% increase in the number of one-on-one pro bono financial planning engagements. FPA thanks and celebrates its nearly 50 FPA chapters and more than 1,000 members for their unwavering commitment to quickly adapt pro bono efforts to provide guidance to 11,637 underserved and at-risk individuals and families through one-on-one engagements and through a variety of additional pro bono programs. [Learn more about FPA's pro bono efforts.](#)

Skip Schweiss, CFP®, AIF® on Adapting to Change and Becoming a True Profession

Get a glimpse of 2021 FPA President Skip Schweiss's views on FPA's value, key priorities for advocacy, the OneFPA Network, and vision for the financial planning profession. [Learn more.](#)

What is New at FPA? Check Out the Latest FPA Quarterly 'Snapshot'

FPA is pleased to share the fourth quarter 2020 'Snapshot' to keep you informed of new FPA members benefits and activities that support you and the financial planning profession. Each quarter, FPA reports on the most significant developments in member benefits and services in the areas of learn, lead and connect. [Access the fourth quarter 2020 Snapshot now.](#)

Want to Get Media Queries in Your Inbox? Be a Part of FPA MediaSource!

Reporters from around the country are sending out media queries to CFP® professional members of FPA each day. This is a great opportunity for FPA members to engage with reporters on upcoming stories and build name recognition and awareness. Want to take part? Simply attend the All-Member Virtual Media Training on March 4 at 4:00 p.m. ET to take the first step in working with the media. [Register now.](#)

Take 5 is Brought to You by Ryan Insurance Strategy Consultants

Since 2009, FPA has partnered with Ryan Insurance Strategy Consultants to offer FPA members an industry-leading Long Term Disability plan, and recently launched a group voluntary Term Life plan. They also consult with advisory firms in making insurance product recommendations and their network of advisers are available to help solve more complicated insurance planning issues. Learn more at www.ryan-insurance.net.



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"Protecting Your Financial Plans Since 1978"

Attention FPA members and employees!

**The FPA Open
Enrollment period is
February 1st to 28th,
2021**

NEW!

Business Overhead Expense insurance. Simplified underwriting on the first \$6,000 of elected coverage with one health question. Coverage available up to \$20,000 ^() per month!**

Group Short-term and Long-term Disability insurance. Guaranteed issue with no medical questions. ^(*)

Group term Life and AD&D insurance. Simplified underwriting on the first \$50,000 of elected coverage with one health question. ^(*)

Two webinars will be available to learn more about the FPA Open Enrollment.

Please visit the website to sign up for the webinars.

**January 27th
3:00 EST**

**February 3rd
3:00 EST**

Go to: www.AssociationInsuranceBenefits.com for complete product information, applications and to enroll in the webinars.

Members or employees currently enrolled in a product do NOT need to enroll during the open enrollment. A new application should only be submitted if electing a new product.



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(*) Guaranteed Issue only applies if you have not been previously declined due to medical underwriting by Standard Insurance Company or Metropolitan Life Insurance Company for any coverage. Members or employees currently enrolled in the group term Life / AD&D insurance who elect to increase their coverage is subject to medical underwriting on the increased coverage.

(**) Coverage elected over \$6,000 up to \$20,000 is subject to medical underwriting.

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