



Take 5

March 2021

Master the Art of Client Trust and Communication

Being able to communicate effectively is one of the most important skills you can learn, but it's particularly crucial in the financial planning profession. Successful financial planners understand the importance of communication and how it can build client trust. To help you master the art of client communication and building trust, FPA is pleased to offer this round-up of information and resources that are available to FPA members. [Check them out today.](#)

Where are You Investing? The *Journal of Financial Planning* Wants to Hear from You

For the past 15 years, the *Journal of Financial Planning* has conducted the annual Trends in Investing Survey to identify key trends that impact planners and their clients. [Take a few minutes and participate](#) in the 2021 Trends in Investing Survey. Results will be published in the June issue of the *Journal of Financial Planning*, and you'll have a chance to win a \$100 VISA gift card. [Take the survey today.](#)

Support the Advancement of Your Profession

The FPA Political Action Committee (PAC), the only PAC that supports advancing the financial planning profession, is consistently sought out by state and federal agencies as resources and trusted voices of the fiduciary community in a continually changing landscape. Members of Congress are contacted from all sides of the industry and the relationships we forge on and off the Hill are crucial to doing the right thing on your behalf. To help us fight for our profession, we ask you to [make a contribution](#) to support your FPA PAC. Whether you contribute \$50 or \$5,000, every dollar is appreciated and will support our efforts in advocating on your behalf.

Podcast: The Future of the Financial Planning Association

In a recent *Gaining Perspective* podcast episode hosted by *Advisor Perspectives*, FPA President Skip Schweiss, CFP®, AIF®, and FPA CEO Patrick D. Mahoney discuss FPA's role in the profession and their vision for future of the Association. [Tune into this episode.](#)

Advantage of Opportunities to Save on Products and Services

FPA members can access special discounts and rates on various products and services that help with the practice of financial planning. [Learn more about these opportunities to save.](#)

New to the profession? Check out the FPA Next Generation Planner

In this month's *FPA Next Generation Planner*, learn about trends influencing the FinTech landscape, the changing role of financial planners, tips on how to improve yourself in your spare time, and more. [View the March issue.](#)

*Thank you to Finance of America Reverse for powering this month's *FPA Next Generation Planner*

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.

