Journal of Financial Planning: May 2021 Sample Study Group Topics

- 1. Our <u>Cover Story</u> features stories of different members' paths into the financial planning profession. Discuss your paths and how FPA has helped shape your career.
- 2. Our <u>Leadership Column</u> discusses the "quit or continue decision". Talk about times in your profession or practice when you have encountered this sort of crossroads and the overall outcome. As we all learn from our mistakes, discuss what you may have done differently.
- 3. In the *Next Generation Planner* section of the issue, Lawrence Sprung lays out some guidelines for a successful social media strategy. Putting yourself in your clients' shoes, discuss how authenticity, remaining active, and sharing your story could benefit your practice.
- 4. In our <u>Special Report</u>, Bill Reichenstein writes about different Social Security claiming strategies. Discuss the different examples given and share client situations you have had, or currently have, where this information would be beneficial.
- 5. The authors of our <u>Research Contribution</u> analyzed how style analysis and sector rotation are intertwined, using the Fama-French Three-Factor model. Delve into the topic and discuss the analysis.