



Take 5

June 2021

Register Today: 'State of FPA' Virtual Update Scheduled for July 8

What has FPA been doing over the past several months to serve our members and elevate the profession? What do the 2020 audited financial statements show about the financial health of the association? Join FPA leaders for a 'State of FPA' Virtual Update on July 8 at 3:30 p.m. ET to learn about the soon-to-be-released 2020 FPA Annual Report, how your membership association is doing today, and what is on the horizon. [Register to attend.](#)

Registration is Open for FPA Annual Conference 2021

The FPA Annual Conference is an immersive, three-day experience that will provide you what you need to pursue mastery in the business, practice and profession of financial planning. #FPAConf21 is where the profession's leaders, innovators and change-makers will gather to learn the latest in financial planning and share their secrets for success. Join your colleagues (in-person!), a diverse group of expert presenters from the profession and our difference-making partners, from September 22–24 at the Greater Columbus Convention Center in Columbus, Ohio to share insights on the topics that matter and participate in discussions that get to the heart of the important work you do every day. Early bird registration is now open with tremendous savings! [Register today.](#)

FPA Members: Register for Congressional Advocacy Day

For several years, FPA has held a DC Advocacy Day to provide FPA members and leaders an opportunity to meet personally with Members of Congress and Administration officials. This year the traditional Advocacy Day is being expanded to include FPA's Financial Planning Coalition (Coalition) partners, CFP Board and NAPFA. The Coalition is sponsoring a Congressional Advocacy Day on September 29 and all FPA members are encouraged to register. Since there is no fee to participate, taking part will only cost you your time and energy. [Register by July 1!](#)

New Research: Interest in Cryptocurrencies Increasing Among Advisers and Clients

FPA, the *Journal of Financial Planning*, and Onramp Invest just released annual research, the *2021 Trends In Investing Survey*, to show where financial advisers are investing today and where they plan to invest in the coming year. The Survey reveals that 14 percent of financial advisers are using or recommending cryptocurrencies today and that 26 percent plan to increase their use or recommendation over the next 12 months. Want to see what else is trending? [Check out the 2021 Trends in Investing Survey report now.](#)

Cybersecurity Breaches Can Cost You Millions: Protect Your Firm Against Cyber Attacks

To help financial planners protect data and comply with SEC and FINRA requirements, FPA offers *Cybersecurity for Financial Planners: An FPA Certificate Program*. The program, developed in partnership with FCI, guides financial planners through a step-by-step process to establish a customized cybersecurity plan that ensures financial planners are adopting reliable security measures that safeguard client data and provide a record of the firm's cybersecurity practices. Those completing the course will receive a digital certificate for accomplishment and have a compliant cybersecurity plan for their firm. CERTIFIED FINANCIAL PLANNER™ professionals completing the entire program will earn 2.5 CFP® CE credits. [Register for the certificate program.](#)

FPA Members Save 15% Off Eligible Kaplan, Inc. Programs

As an FPA member, you can save on various Kaplan, Inc. programs, including licensing exam prep, education programs for professional designations, CFP® certification and more. In addition, the College for Financial Planning®—a Kaplan Company offers scholarships to pursue CFP® certification, a professional designation, or a Master of Science Degree in Personal Financial Planning. [Learn more.](#)

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 associationinsurancebenefits.com.



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