



Take 5

July 2021

Now Available: The 2020 FPA Annual Report

FPA is pleased to announce the availability of the 2020 FPA Annual Report covering the work of the Association in 2020, and including last year's audited financial statements, an update on the OneFPA Network beta test, and more. Get caught up on how your Association is working for you and the profession. [Check out the Annual Report now.](#)

The Breakout Sessions You Need at FPA Annual Conference 2021

We're excited to be counting down the days until [FPA Annual Conference 2021](#)! This week, we are highlighting a few [breakout speakers](#): Rianka Dorsainvil, CFP®, Robert Sofia, Jean Dunn, CFP®, and Lawrence Pon, CFP®, CPA, EA, USTCP, AEP®. Each speaker will have a unique presentation that provides new insight and provokes discussion among your peers. We can't wait to see you September 22-24 in Columbus, Ohio! [Register today!](#)

The Journal of Financial Planning: Access Anytime, Anywhere

For more than four decades, the award-winning *Journal of Financial Planning* has published cutting-edge financial planning research and insights. Financial planners of all backgrounds have depended on the *Journal* to help them build their professional competencies and stay up-to-date on the latest trends and practices. The *Journal's* high-quality content is now available on all your devices. [Get anytime access to the Journal](#) now to get caught up on all you need to be the best financial planner you can be.

Did You Miss the July 8 'State of FPA' Virtual Update? Check Out the Recording!

All FPA members were invited to join FPA leaders for a 'State of FPA' Virtual Update on July 8 to learn about the just released 2020 FPA Annual Report, the organization's recent audited financial statements, how your membership association is doing today, and what is on the horizon. Attendees also engaged in a vibrant Q&A with FPA President Skip Schweiss, FPA CEO Patrick Mahoney, and other leaders. [View the recording.](#)

Registration Deadline Alert: FPA NexGen Gathering!

The registration deadline for [FPA NexGen Gathering](#) is July 19, so now is the time to register for the virtual event taking place August 11-13! Don't miss out on the connections, learning, and camaraderie that comes with attending. Register now to participate in this one-of-a-kind gathering of the next generation and see what you need to do to take your career – and the profession – to the next level. [Register now!](#)

FPA Has Raised its Advocacy Game to Help You Raise Yours

FPA is helping members keep their thumbs on the pulse of proposed legislation through the newly launched GovHawk platform. This new tracking system monitors legislation and regulation that FPA is tracking to help FPA members stay informed. From detailed summaries to FPA position statements, members can now stay up-to-date with the click of a mouse. For those measures that may have a consequential impact on financial planning and members' practices, FPA provides template letters members can send to their elected officials directly through the platform. Be sure your voice is heard by those with the power to influence your profession. [Access GovHawk 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 associationinsurancebenefits.com.

