FPA FINANCIAL PLANNING ASSOCIATION

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An update on the programs and services exclusively for valued FPA members

November 2021

The FPA Fall Learning Series is Underway — and It's No Cost for Members!

The FPA Fall Learning Series is officially underway, and this is your opportunity as an FPA member to gain a ton of insight into tax and estate planning. There are a multitude of relevant learning programs, live discussions, and a ton of CFP® CE credits available. And, best of all, there is no cost for FPA members to participate! Check out all this exciting program has to offer you!

FPA and SoFi Partner to Provide Exclusive Access to Suite of Financial Solutions

SoFi, a leading next-generation financial services platform, and FPA announced the launch of a strategic partnership between the two organizations designed to benefit FPA's financial planner members and the clients they serve. The partnership provides FPA members – and their clients! – with preferred rates and exclusive access to a suite of financial solutions, services, and educational resources, including Student Loan Refinancing and Private Student Loans. Learn about this new member benefit today in the FPA Marketplace.

The November *Journal of Financial Planning* is Now Available

FPA members can now read the November issue of the *Journal of Financial Planning*, powered by Allianz, to learn more about the pressures that have led to the racial wealth gap and how planners can help close it, what neurodivergent clients need from financial relationships, and how your own unexamined biases can impact your planning. Access the latest issue of the Journal now.

The Kitces Financial Planning Value Summit: Special Offer for FPA Members!

As more advisers adopt a fee-for-service approach of charging outright for financial planning, the need to "prove" their financial planning value to prospects and clients becomes increasingly more important. Attend the Kitces Financial Planning Value Summit on Dec. 8 where you'll get a behind-the-scenes look at the actual strategies and deliverables that successful advisers have developed to stand out and communicate their value to prospects and clients. ***FPA members receive $50 off with discount code KitcesSummitFPA***. Register today!

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NARSSA and FPA Partner to Help Members Enhance Their Social Security Knowledge

The National Association of Registered Social Security Analysts (NARSSA), the leader in expert Social Security education, training, and analysis fulfillment for financial professionals, has announced a new partnership with FPA. NARSSA and FPA will work on several initiatives to help educate FPA members on Social Security, including access to the RSSA course. The collaboration will also include Social Security insights and education delivered through webinars, workshops, contributed articles to FPA's *Journal of Financial Planning*, blogs, and more. Learn more.

Discover BHG—Exclusive Financing Partner of FPA

FPA has partnered with BHG to provide our members with easy access to a full suite of fast, hassle-free financial solutions, including business, consumer, and SBA 7(a) loans, as well as credit cards. BHG offers large amounts and extended repayment terms, which can help you make a significant impact on your finances fast—while keeping your monthly payment affordably low. Want to learn more? Discover BHG.

Financial Advisers Needed for Research Study on Long-Term Care Insurance

Researchers from the National Association of Insurance Commissioners' Center for Insurance Policy and Research, the University of Georgia, and California Health Advocates are recruiting financial advisers who have worked with long-term care insurance (LTCI) policyholders. The purpose of this project is to add to our understanding of consumer knowledge and attitudes about LTCI, especially those who have received premium increase notices. Volunteers will participate in one-hour virtual interviews in November or December 2021 with a $125 honorarium. To indicate your interest in the project, please click here.