FINANCIAL PLANNING ASSOCIATION

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

December 2021

Get All the Great Content from the Fall Learning Series - at No Cost - Through the End of 2021!

The FPA Fall Learning Series has officially come to an end, but all of the content is still available for FPA members through the end of the year at no cost! The four-week program offered members access to live and on-demand webinars covering tax and estate planning, planning for life events, business planning, and so much more. There are more than 20 webinars offering 13 CE credits. All you need to do is login to the FPA website to take advantage of this great member benefit!

We also want to acknowledge and thank Prudential, Finance of America Reverse, T. Rowe Price, Orion, Janus Henderson Investors, and UnitedHealthcare for their support of the Fall Learning Series. Their webinars and content added to the value of the program, so be sure to check their sessions out as well. They include:

- The Psychology of Risk with Dr. Daniel Crosby, sponsored by Orion.
- Adding Home Equity to Retirement Income Plans with Steve Resch, sponsored by Finance of America Reverse.
- Are Your Prepared for the Next Wave of Wealth? with Jean Dunn, CFP®, sponsored by T. Rowe Price.
- A New Strategy to Generate Lifetime Income with David Blanchett, Phd, CLU, ChFC®, CFP®, CFA®, and Michael Visconti, CFP®, sponsored by Prudential.

Register Now to Attend FPA Retreat 2022!

It has been two long years since we have been able to welcome you to FPA Retreat. And after experiencing the societal trials and tribulations of the past couple of years, you owe it to yourself to reconnect with your peers in a thought-provoking experience unlike any other. The top minds in the profession will reconvene at FPA Retreat from April 25-28 at the Hyatt Regency Lost Pines Resort and Spa in Lost Pines, TX, for a one-of-a-kind event designed to help you relax, be reinvigorated, and challenge your way of thinking about yourself, your business, and your profession. Register by January 31 to attend at a special early bird rate!

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The December *Journal of Financial Planning* is Now Available

FPA members can now read the December issue of the *Journal of Financial Planning*, powered by Ameritas, to learn more about advice-only planning models, the future of advice, the role of quantitative data gathering in developing client trust and commitment, and much more. Access the latest issue of the Journal now.

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.

FPA and CNBC co-branded 'Money Matters' newsletter

Want the latest investments and personal finance headlines delivered to your inbox twice each month? FPA and CNBC are collaborating to publish the co-branded Money Matters newsletter exclusively for FPA members. Delivered twice each month, the newsletter delivers the latest headlines from CNBC that you need to read. Opt-in for Money Matters now!

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.