

# Take 5

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



January 2022

## **FPA Website Improved to Make Your Experience Better**

FPA is pleased to announce that the web experience has been improved to make it easier for members to find what they want – when they want it. The website’s navigation has been simplified and is now based on a P-L-A-N structure, which includes the verticals Practice Support, Learning, Advocacy, and Networking. The latest and most relevant member benefits are easily found on the homepage and ongoing updates will take place to ensure members can find and engage with the benefits they want. [Visit the newly updated FPA website now!](#)

## **Participate in the Annual T3/Inside Information Software Survey**

The annual [T3/Inside Information Software Survey](#) has gone live. It’s your opportunity to rate the software programs and solutions in your tech stack and provide data for a report that offers user ratings and market share information in 35 different categories. Many advisory firms use the report as a buyer’s guide as they consider additions to their office technology. FPA will send the full results out to all members, regardless of whether you’ve completed the survey or not. But the more people who provide their input and ratings, the more accurate the data will be. The survey is open from now until March 25 and it only takes 15-minutes to complete. [Take the survey now!](#)

## **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!](#)

### Want to get media queries in your inbox? Be a part of FPA MediaSource!

Reporters from around the country are sending out media queries to CFP® professional members of FPA each day. This is a great opportunity for FPA members to engage with reporters on upcoming stories and build name recognition and awareness. Want to take part? Simply attend one of the quarterly All-Member Virtual Media Trainings planned for 2022 to take the first step in working with the media. [Check out the media training schedule and register today!](#)

### FPA and NARSSA Partner to Augment Financial Planner Social Security Knowledge

FPA and the National Association of Registered Social Security Analysts (NARSSA), the leader in expert Social Security education, training, and analysis fulfillment, are partnering to help educate FPA members on Social Security, including access to the RSSA course. The five-module course teaches all aspects of Social Security and trains financial professionals to expertly use leading-edge Social Security maximization software. At the completion of the course, FPA members are eligible to earn their RSSA® credential. FPA members save \$300 on course registration. [Learn more.](#)

### The January *Journal of Financial Planning* is Now Available

FPA members can now read the January issue of the *Journal of Financial Planning*, powered by Allianz, to learn about reassessing risk assessments, how to best present information to clients, the opportunities afforded by a subscription-based model, navigating estate planning with blended families, required minimum distributions as a retirement strategy, and much more. [Access the latest issue of the Journal 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](https://www.associationinsurancebenefits.com).



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