

Take 5

An update on the programs and services
that make FPA *your partner in planning*.



February 2022

New Research Reveals How to Build Client Trust and Commitment

How have virtual meetings impacted engagement with financial planning clients? Are financial planners adequately addressing the anxiety clients are feeling about their financial well-being? Are financial planners meeting client expectations? These and other topics were explored in new research that is detailed in an in-depth whitepaper, ***Developing and Maintaining Client Trust and Commitment in a Rapidly Changing Environment***, with each chapter available as separate, downloadable documents. This research was supported by Allianz Life Insurance Company of North America. [Access the whitepaper now!](#)

As Your Partner in Planning, FPA Has the P-L-A-N for You

FPA's 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!](#)

Join Michael Kitces at FPA Retreat 2022!

What better way to close out FPA Retreat than an interactive general session with a giant in the financial planning profession? Unplugged and unfiltered, Michael Kitces will be at FPA Retreat for an open, honest, 'ask me anything' session all attendees will enjoy. FPA Retreat will be held April 23-25 at the Hyatt Regency Lost Pines Resort and Spa in Lost Pines, TX. [Register now to be there with Michael, friends, and colleagues!](#)

The February Journal of Financial Planning is Now Available

The *Journal of Financial Planning* has been expanding the base of professional knowledge in financial planning for 43 years. And that continues this month with the availability of the February 2022 issue. This month, the *Journal* tackles a host of important issues that are relevant to you, your business, and your clients. [FPA members can access the February issue 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!](#)

Support the FPA Political Action Committee (FPA PAC)

As the only federally registered political action committee with a focus on financial planners, the FPA Political Action Committee (FPA PAC) is a force in elevating the profession. To impact policies and legislation that affect the profession, the FPA PAC provides the FPA and the financial planning community with a critical voice at the federal level, opening doors for important discussions, allowing us to forge relationships with federal lawmakers and to tell the financial planning story on a visible and impactful stage. [Learn more and support FPA PAC today.](#)

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!](#)

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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