

Take 5

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



March 2022

Carson Coaching Becomes FPA's Official Coaching Partner

With an eye on helping members serve their clients, grow their firms, and leave a lasting impact, FPA is pleased to announce that Carson Coaching has become the Association's official coaching partner. Through the partnership, Carson Coaching is providing several exciting opportunities for FPA members to positively impact themselves and their businesses. Members can now access Carson's online coaching center, monthly group coaching, discounts to attend many Carson programs, and much more. [Learn more about all that is now available to you as an FPA member!](#)

Don't Wait. Register for FPA Retreat 2022 Now!

The top minds in the profession will reconvene at [FPA Retreat 2022](#)—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. Over four days, you will be invited to share ideas, examine critical issues, and learn how you play a pivotal role in paving the way forward for the profession. It's an opportunity to rekindle past relationships and forge new ones—all in a beautiful, intimate setting. Join us April 23-25 at the Hyatt Regency Lost Pines Resort and Spa in Lost Pines, TX, for a one-of-a-kind event. [Register now!](#)

New Member Benefit: Premium Discount on Individual Disability Insurance

As part of the suite of insurance solutions available through Ryan Insurance Strategy Consultants, FPA members can now access a 10% premium discount on premiere individual disability policies through Principal — a disability income insurance leader. This terrific new offering for FPA members includes a non-cancelable policy with fixed premiums, a true own occupation protection full benefit period, guaranteed options to increase benefits non-medically, and three separate cost of living adjustment riders. [Learn more!](#)

The March 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 March 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 March issue now!](#)

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!](#)

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.](#)

FPA Job Board Has Solutions to Help You Grow

FPA is making it easy for companies to find ideal candidates while supporting those looking for their next career opportunity. The FPA Job Board allows job seekers to showcase their skills and work experience to prospective employers and provides employers access to a qualified talent pool to fill open positions. In partnership with the Financial Job Exchange (FJE), the FPA Job Board aims to provide the most relevant jobs for candidates and the highest return on investment for employers. [See what the FPA Job Board can do for you!](#)

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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