

Take 5

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



April 2022

Latest CEO Update Highlights FPA's Recent Efforts on Behalf of Members

Each quarter, FPA CEO Patrick Mahoney provides a look at what the Association has been doing to support members, empower chapters, and elevate the profession. The first quarter of 2022 was busy for FPA that featured new partnerships, exciting new benefits for members, important advocacy work, and much more. [Read Patrick's latest update](#) now to see how FPA as **Your Partner in Planning™** is more than catchy tagline!

Registration is Now Open for FPA NexGen Gathering 2022 - in Las Vegas!

After two years in the virtual world, FPA NexGen Gathering is back in-person and better than ever. For the first time Gathering will take place in a resort atmosphere rather than a college campus. The venue may be different but the main draw of the event remains the same: [FPA NexGen Gathering 2022](#) is built by, and for, those who are new to the financial planning profession. Experience a community-style learning environment with peer-led sessions and roundtable forums that allow you to increase your professional knowledge, form lasting relationships, and leave inspired to put what you learned into action. Join us August 23-25 at the Flamingo Las Vegas Hotel and Casino. [Register](#) by May 6 and attend at \$100 off the regular registration fee!

The April Journal of Financial Planning is Now Available

FPA members can now read the April issue of the *Journal of Financial Planning*, powered by UnitedHealthcare, to learn more about succession and transition planning, the impact of financial technology on behaviors, distribution of inherited IRAs, and much more. [Access the latest issue](#) of the *Journal* now.

FPA Media Training Program is Now On-Demand

The media training program for FPA members who want to be part of the popular FPA MediaSource system is now available whenever you want. No longer do you need to wait for a live, quarterly training. Simply access the training on-demand whenever you're ready. Once the 90-minute session is concluded, you will be invited to join FPA MediaSource so you can start to get the journalist queries in your inbox every day! [Take the training now to get started!](#)

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. Be sure to [check out the recording](#) to learn more about what the partnership means for you!

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 are taking place to ensure members can find and engage with the benefits they want. [Visit the refreshed FPA website now!](#)

FPA Members Save 15% Off Eligible Kaplan, Inc. Programs

As an FPA member, your members can save on various Kaplan, Inc. programs, including licensing exam prep, education programs for professional designations, CFP® certification and more. In addition, the College for Financial Planning®—a Kaplan Company offers scholarships to pursue CFP® certification, a professional designation, or a Master of Science Degree in Personal Financial Planning. [Learn more.](#)

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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