

# Take 5

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



May 2022

## **FPA Successfully Lobbies to Protect Kentucky Members**

In recent legislation, the Kentucky legislature considered replacing the state income tax with a variety of sales taxes on services, including personal financial planning and personal investment management services. To protect members, FPA and the FPA Political Action Committee secured a lobbyist to advocate for the removal of those proposed taxes from the final bill. The effort was a success. Learn more about the effort to protect members [in this release](#).

## **FPA Virtual Externship Returns This Summer – Registration is Open**

To open the doors of the financial planning profession and build a pipeline of new talent, FPA will host the FPA Virtual Externship again this summer. In partnership with eMoney Advisor, the College for Financial Planning®—a Kaplan Company, and Schwab Advisor Services in partnership with Charles Schwab Foundation, the eight-week program will be held from June 6 through July 29. [Registration is now open until May 27.](#)

## **FPA NexGen® Gathering is Heading to Vegas and Registration is Open**

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 was built by, and for, those who are new to the financial planning profession. Join us August 23-25 at the Flamingo Las Vegas Hotel & Casino. And thank you to our partners at Ryan Insurance Strategy Consultants and the College for Financial Planning®—a Kaplan Company for their generous support of Gathering! [Register now and save on the regular registration fee.](#)

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

FPA members can now read the May issue of the *Journal of Financial Planning*, powered by Prudential, to learn more about how planners can help clients – and their children – build healthy financial habits, guiding clients through divorce, creating effective processes for your business, and much more. [Access the latest issue of the Journal.](#)

### 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!](#)

### Check Out the Many Events FPA Chapters are Hosting in the Coming Months!

FPA chapters across the country are hosting a wide variety of events and programs to help members learn the critical skills they need as financial planners and connect with their peers. From monthly educational programs to social gatherings to annual symposia, FPA chapters do it all. Learn more about the upcoming programs chapters are hosting and see how you can take part. In this increasingly virtual world, many chapters are providing opportunities for members across the country to participate in their events. [See what events are coming up!](#)

### 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!](#)

## 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](http://associationinsurancebenefits.com).



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