FINANCIAL PLANNING ASSOCIATION

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

June 2022

New Research: Is Financial Planner Interest in ESG and Crypto Waning?

FPA and the *Journal of Financial Planning* just released annual research, the **2022 Trends in Investing Report**, to show where financial advisers are investing today and where they plan to invest in the coming year. The report reveals that while financial adviser use/recommendation of environmental, social, and governance (ESG) investing strategies have remained consistent over the past four years, that usage could see a downward swing over the next 12 months. See what's trending in the 2022 Trends in Investing Survey report.

Viva Las Vegas! Register Now for FPA NexGen Gathering 2022

After two years in the virtual world, FPA NexGen Gathering is back in-person and better than ever. For the first time, Gathering, sponsored by College for Financial Planning®—a Kaplan Company, Dimensional Fund Advisors, Goldman Sachs, Ryan Insurance Strategy Consultants, and University of Georgia 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. Register by June 10 and save on your registration!

College Planning Certificate Now Available to Financial Planners

With over 44 million student loan borrowers and outstanding education debt exceeding $1.7 trillion, financial planners can play a pivotal role in helping families plan and pay for college. To help you serve the needs of clients with college-bound children, FPA has partnered with College Aid Pro™ to launch ***College Planning Made Easy: An FPA Certificate Program***. The course, which qualifies for 4.5 CFP® CE credits, provides a deep dive into not only the technical aspects of navigating the college funding maze, but also practical talk tracks and exercises to help planners connect with their clients and guide them through the behavioral and emotional aspects of the college buying decision. Learn more.

The June *Journal of Financial Planning* is Now Available

FPA members can now read the June issue of the *Journal of Financial Planning* to learn more about financial planner sentiment on investments like ESG and crypto, how planners should approach client meetings, optimal Social Security claiming and withdrawal strategies, and much more. Access the latest issue of the *Journal*.

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Your Ticket to the World's Largest Wealth Festival

Future Proof is a groundbreaking new wealth festival set to bring together the world's most prominent figures and emerging minds to explore the intersection of money, tech, culture, and impact. The event brings together an entirely new community of financial advisers, institutional investors, asset managers, fintech startups, financial creators, activists, artists, musicians, and other key stakeholders around an unprecedented experience and agenda. This four-day citywide event will be held Sept. 11-14, in Huntington Beach, Calif. More than 3,000 attendees including 1,500+ financial advisers and institutional investors, as well as over 150 sponsor companies, are expected at the inaugural event. FPA members can join us using discount code **FPAADVISOR** (25% discount).

Take Your Business and Career to the Next Level with Carson Coaching

As the official coaching partner of FPA, 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.

Home Equity U: A Three-Part Series on Using Reverse Mortgages in a Retirement Plan

Do you want to understand how a reverse mortgage works, who could benefit from one, and how to incorporate reverse mortgage strategy into your planning practice as a tool to both enhance and safeguard your clients' retirement? View 1 course or all 3 of this series brought to FPA members by Finance of America Reverse. Register today.