FINANCIAL PLANNING ASSOCIATION

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

July 2022

FPA ANNUAL CONFERENCE

Connection, Learning, and Community to Take Center Stage at FPA Annual Conference 2022

FPA wants to power your desire for human connection, elevate your financial planning know-how, and inspire you to impact your community. Which is why these will be the focus of FPA Annual Conference 2022 to be held December 12-14 at the Seattle Convention Center in Seattle, Wash. Register to attend this annual gathering of CFP® professionals (the largest each year!). There won't be a better place to be this December. Early bird registration is now open until September 16, so don't miss this chance to attend at the lowest rate possible!

Register Today: 'State of FPA' Virtual Update Scheduled for July 21

Join FPA leadership for a "State of FPA" Virtual Update on Thursday, July 21 at 11 a.m. ET (8 a.m. PT) to learn what is taking place in your membership association. Attendees will hear about recent efforts of the Association to drive value in membership, plans for the rest of the year, and the now-available 2021 Annual Report and 2021 audited financial statements. Register now.

Latest 'CEO Update' Highlights the Association's Recent Efforts

FPA CEO Patrick D. Mahoney shared a recent update with members to provide details on new programs and efforts that augment the value of FPA membership. The Q2 2022 CEO Update highlights the recently released 2022 Trends in Investing Report, the launch of a new college funding certificate program, the beginning of the 2022 FPA Virtual Externship, the now-available 2021 FPA Annual Report, and much more. Read the CEO Update!

Hot Off the Press! The July *Journal of Financial Planning* is Now Available

FPA members can now read the July issue of the *Journal of Financial Planning* – powered by Finance of America Reverse – to learn more about distributions from qualified plans, retirement planning for life stages, why next generation planners should be engaged in public policy advocacy, the association between marital status and financial risk tolerance, and much more. Access the latest issue of the *Journal* now.

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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.

FPA Members Can Save 10% On eMoney

FPA Externship exclusive financial planning software partner eMoney provides scalable solutions that meet a broad range of planning needs, so planners always have the right tool for any situation. FPA members can save 10% while bringing client conversations to life with interactive and collaborative planning experiences that promote engagement and foster stronger relationships. Learn more about this special FPA offer.

Introducing A Brand New Wealth Management Event Experience

Once you experience Future Proof, you'll never be able to sit through a canned presentation or thinly veiled sales pitch again. Traditional wealth management conferences can't capture the magic of what our industry does every day: Making real connections, helping people achieve their financial dreams, and embracing new and inspiring ways of thinking. Don't miss the first-ever wealth management festival, which celebrates the incredible diversity, life-changing technology and, most importantly, brilliant and passionate people our industry has to offer. Head to Huntington Beach, California from September 11-14 using discount codes FPAADVISOR (25% for FPA members) or FPAINDUSTRY (10% for industry professionals). Register now.