FINANCIAL PLANNING ASSOCIATION

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

September 2022

Exciting Keynote Speakers Announced for FPA Annual Conference 2022

FPA is pleased to announce the exciting slate of keynote speakers for FPA Annual Conference 2022 in Seattle from December 12-14. Sallie Krawcheck, Keith Ferrazzi, and Traci Brown, CSP, will headline the event that is recognized as the largest gathering of CFP® professionals each year.

Sallie Krawcheck, CEO and co-founder of Ellevest, is one of the few executives to find success in large complex companies and as a startup CEO and is widely recognized as one of the most influential women in business.

Keith Ferrazzi has led profound transformations throughout his career, including as Chief Marketing Officer of Deloitte and Starwood Hotels. He is author of several New York Times best selling books, including *Never Eat Alone*.

Traci Brown, one of the world's foremost body language authorities, has been trained in the body language of deception detection. She now uses her training to teach the lie, fraud, and identity theft detection skills she's used to uncover the truth in billion-dollar business deals, crimes, and politics.

Register to join us in Seattle for a memorable event!

Partnership Makes Behavioral Finance Experts More Accessible to FPA Chapters and Members

FPA and the Financial Behavior Keynote Group have partnered to support FPA chapters and the educational programs they host for FPA Members. The partnership helps chapters secure recognized and respected behavioral finance experts to speak at local educational events at significantly discounted pricing. FPA chapters can now secure Kristy L. Archuleta, Ph.D., LMFT, CFT-I™; Mary Bell Carlson, Ph.D., CFP®, AFC®; Ryan H. Law, CFP®, AFC®; and Michael G. Thomas, Jr., Ph.D., AFC®, with a 20% discount on in-person and virtual events. Chapters with fewer than 400 members can secure an additional 20% discount. Learn more.

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The FPA Policy Center Connects You to the Issues that Matter

FPA wants to partner with you to be a voice for the financial planning community on Capitol Hill, in state legislatures, and with regulatory and certifying bodies. FPA works to ensure that the issues that matter to you most are incorporated into the rules and regulations that shape the trajectory of the profession. The FPA Policy Center provides you clarity about the issues we are tracking, positions on potential policies and regulations, tools and programs you can use to get engaged in the process, and much more. Learn more about the issues that matter.

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.

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

FPA members can now read the September issue of the *Journal of Financial Planning* to dig into regulatory risk, how to remotivate employees to get back into growth mode, how emotional intelligence can deepen client relationships, the role of personal financial salience, the power of using illustrations to educate, implications of SECURE Act 2.0 on retirement decumulation, and much more. Access the latest issue of the *Journal* now.