Take 5

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

October 2022

The Content You Want and the Experts You Trust at FPA Annual Conference 2022

FPA Annual Conference 2022 will be a terrific event you won't want to miss. We will be joined by Sallie Krawcheck, Keith Ferrazzi, and Traci Brown as our keynote speakers. We will feature over 50 breakout sessions with amazing thought leaders like Wade Pfau, David Blanchett, Ric Edelman, Gary Altman, Kimberly Foss, Bridget Grimes, Charesse Spiller, Megan McCoy, Sonya Lutter, Travis G. Parry, Zoe Meggert, Stephen Resch, Daniel Yerger, and many others! Join us December 12-14 in Seattle, and be sure to register with an advance registration fee that will make joining us even more affordable. Register today.

Introducing the Psychology of Financial Planning Specialist Badge Program

With increased recognition of psychology's impact on financial behavior, there is a need for today's financial planning professionals to understand better how they can best serve their clients. In response, FPA announced a new partnership to offer members access to the Psychology of Financial Planning Specialist Badge™ — an on-demand program for financial planners with over 7 hours of video instruction and exercises. Developed by Dr. Brad Klontz, Psy.D., CFP®, and Dr. Charles Chaffin, the program includes 9 CFP® CE credits for those who complete the program. FPA members can complete the program at a discounted rate of $495.

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

FPA members can now read the October issue of the *Journal of Financial Planning* to dig into tax planning topics. The latest issue covers state income taxation of nonresident equity-based compensation, direct indexing for tax loss harvesting, an exploration of where taxes and retirement collide, and much more. Access the latest issue of the *Journal* now.

FPA Offers Insurance Programs for Today's Financial Planner

As your partner in planning, FPA wants to help you protect your business and employees through a variety of insurance programs that are exclusively offered to our valued members. We've partnered with Ryan Insurance Strategy Consultants, one of the profession's leading providers of insurance services, to make several programs available to you – at significant savings. Learn about the available insurance programs FPA is proud to offer you!

Take 5

Giving is Good for Your Heart...and Your Clients

Philanthropy is an increasingly important area of opportunity for planners and clients. Philanthropic Solutions in Financial Planning, an American Heart Association and FPA certificate program, presents philanthropic planning within the context of values-based planning and examines the multiple ways clients benefit from philanthropy and what advisors gain from incorporating philanthropic planning in their practice. Free to all. Register now.

Financial-Themed Greeting Cards for Clients and Prospects

Wall Street Greetings offers high-quality greeting cards at an impressively low price. All products are designed in house (made in America) and printed with the highest quality papers and foils. With 40% off retail prices and FPA-specific discounts available, FPA members receive the best price on cards to send to clients and prospects throughout the year. Learn more.

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!

Stay on Top of What's Trending with *FPA SmartBrief*

Subscribe today to receive this twice weekly snapshot of what's taking place in the financial planning profession with news from the *Journal of Financial Planning* and other leading news sources. Each issue features summaries of what matters to you, written by expert editors to save you time and keep you informed and prepared. Subscribe to this complimentary newsletter today!