Take 5

FINANCIAL PLANNING ASSOCIATION

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

November 2022

Continued Savings to Attend FPA Annual Conference 2022 Still Available

If you were thinking of attending FPA Annual Conference 2022 in Seattle from Dec. 12-14 but think you missed out on the advance pricing that would have allowed you to register for a lower cost, we have some good news for you. We have decided to keep the special advance registration pricing in place from now until the conference. So, register today to join us in Seattle to see terrific keynote speakers like Sallie Krawcheck and Keith Ferrazzi, more than 50 breakout sessions with enough CE to satisfy many of your CFP® requirements, and so much more. Register now!

We Can Help: Supporting Those Impacted by Hurricane Ian

Hurricane Ian had a devastating impact on Southwest Florida. We all have read the news reports or watched the footage. Our hearts go out to all those coping with the hurricane's impact as they face a long rebuild in the months ahead. Many have asked how you can help. In a recent communication to all FPA Members, FPA President Dennis Moore, CFP®, and FPA CEO Patrick Mahoney provided information on how we can assist with financial support through the United Way of Florida and FPA's new Hurricane Ian Support Relief Community on FPA Connect. Learn more.

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

FPA members can now read the November issue of the *Journal of Financial Planning* to explore empathy and emotional intelligence in serving diverse clients, the value of employee resource groups, the three most important trends in wealth management, cultural diversity and risk management, the role of financial planners on African American business owners' personal credit and access to capital, and much more. Access the latest issue of the *Journal* now.

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.

Take 5

Utah Valley University Named Winner of the 2022 Financial Planning Challenge

FPA, Ameriprise Financial, and CFP Board are pleased to announce that the student team from Utah Valley University in Orem, Utah, has been named the 2022 Financial Planning Challenge winner. This annual competition provides students in financial planning programs across the country with a forum to showcase their knowledge and planning acumen on a national stage. Congratulations to the student competitors: Abby Adams, Colten Orton, Siria Trochez, and their faculty advisor Hyrum Smith, Ph.D., CFP®, CPA. Learn more.

Live Webinar: The Top 10 Charitable Trends Every Adviser Should Know Before the End of the Year

Join the American Heart Association on Nov. 29 at 2:00 p.m. ET for a deep dive into the top 10 trends that directly impact the charitable planning landscape. Learn how tax changes are impacting charitable giving, raising the right charitable question at the right time with clients, and all about the hottest charitable planning trends/vehicles following tax act changes. This event qualifies for 1 CFP® CE credit. Register now.

Build Your Awareness with FPA MediaSource

FPA MediaSource has sent more than 6,500 journalist queries to FPA members over the past five years. That's a lot of media attention for those members, so don't miss out. To get started, simply take the on-demand 90-minute media training available through FPA. Simply access the training on-demand whenever you're ready. Once the session is concluded, you will be invited to join FPA MediaSource so you can start to get the journalist queries in your inbox every day! Take the training now to get started!