

Take 5

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



December 2022



FPA Retreat 2023: Register For This Truly Unique Experience

The financial services industry is chock full of conferences and events for financial advisers and planners, but none of them are like what you can experience at [FPA Retreat 2023](#). Taking place May 1-4 at the Hyatt Regency Coconut Point Resort and Spa in Bonita Springs, Fla., FPA Retreat 2023 is where you challenge your thinking, forge lasting connections, and nurture your desire to pursue excellence in financial planning. Register by January 31 to attend at the lowest possible rate with our special early bird pricing. [Register now](#) and we'll see you there!

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 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.

The December Journal of Financial Planning Now Available

FPA members can now read the December issue of the *Journal of Financial Planning* to explore donor-advised funds, the skills required to build the right team, individual retiree risk management, women and charitable giving, how to audit your firm's tech stack, the science of building trust and commitment in financial planning, and much more. [Access the latest issue](#) of the *Journal* now.

Check Out the New FPA Health Insurance Marketplace For Members

Get instant quotes and apply online for individual, group, and Medicare insurance products. The ACA open enrollment period starts November 1 in most states, so schedule an appointment with a licensed benefits counselor today. [Get started!](#)

The FPA Marketplace: Savings On the Products and Services You Need

The FPA Marketplace powered by the Chalice Network® is providing incredible savings to our valued FPA members. Through the Marketplace, you can access many benefits designed to help you professionally and personally, including our various insurance programs. In addition, you can also access BenefitHub that offers you potentially thousands of dollars in savings on a wide range of services and programs from top companies like Verizon, Costco, GEICO, Avis, Hertz, Disney, AMC, Gap, and many more. [Access the new FPA Marketplace 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.](#)

FPA Members Can Save On Auto Insurance

There are countless options for auto insurance. That's why FPA has chosen Member Options to help our valued members. Savings have been reported as high as \$810! You can get multiple, no obligation quotes from up to five top carriers in a matter of minutes. Call Member Options at 833.378.8224 or visit member-options.com/fpa to get started today!

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!](#)

Take 5 is Brought to You by Ryan Insurance Strategy Consultants

Since 2009, FPA has partnered with Ryan Insurance Strategy Consultants to offer FPA members an industry-leading Long Term Disability plan, and recently launched a group voluntary Term Life plan. They also consult with advisory firms in making insurance product recommendations and their network of advisers are available to help solve more complicated insurance planning issues. Learn more at associationinsurancebenefits.com.



RYAN INSURANCE
STRATEGY CONSULTANTS
Powered by Gallagher Affinity