

## Title Protection Engagement Timeline

FPA believes the legal recognition of the term "financial planner" through title protection is an acknowledgment that anyone proclaiming to be a financial planner meets threshold standards that protect consumers and advances the financial planning profession.

FPA will be open and transparent about the threshold standards we believe will protect consumers and advance the profession after fully engaging our stakeholders. We are going into this effort free of any artificial limitations or preconceived notions of what the standards should be, which is why we are going to engage internal and external stakeholders throughout the process.

Learn More >>>

02-03 2024 Legislative/Regulatory Preparation Distillation of data collected on draft documentation. Refine, finalize, and prepare for official launch of pursuit. 01 2024 **Defined Consultation** Engage internal and external stakeholders on draft documentation. 03-04 2023 **Analysis** Distillation of all data collected to determine the path forward and develop draft documentation. **Q1-Q2** 2023 Consultation Engage internal and external stakeholders to gather ideas and insights.