

Take 5

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



January 2023



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!

Participate in an Upcoming FPA Member Town Hall on Title Protection

The legal recognition of the term "financial planner" through title protection is [FPA's long-term advocacy objective](#). We will be working over the next couple of years to define our strategies and identify the threshold standards for competency and ethics that anyone proclaiming to be a financial planner should meet. As an FPA Member, we need you to share your thoughts and opinions. FPA leaders will hold a series of virtual town halls with FPA Members so you can share your questions and ideas that will help shape the potential threshold standards and strategies the Association may employ in pursuit of this lofty goal. [Register for a town hall now!](#)

The January Journal of Financial Planning Now Available

FPA members can now read the January issue of the *Journal of Financial Planning* for a deep dive into behavioral finance. Learn how to untangle behavioral finance and the psychology of financial planning, explore the leadership qualities that drive engagement, availability bias, strategies for team resilience, behavioral marketing, recent Social Security reform proposals, and much more. [Access the latest issue](#) of the *Journal* now.

The Journal of Financial Planning: Best of 2022 Special Issue Is Now Available

As an FPA Member, we thank you for being a part of our community. Your contributions make us who we are, and your ongoing membership matters. As a gesture of our sincere appreciation, we're delighted to share the *Journal of Financial Planning: Best of 2022*, a special bonus issue highlighting the best content throughout the year. This special edition of the *Journal* showcases the best content from 2022 and is available only to FPA Members. [Access the special edition now.](#)

Introducing the FPA Business Hub

Explore thought leadership content and solutions from experts and vendors across financial services with the new [FPA Business Hub](#). Access this curated online library of timely and downloadable content on more than 10 critical topics. With a mix of technical, management, and professional development content, the Hub is designed to meet your needs. The Hub already features 40+ downloadable pieces of content and more will be added regularly. [Access the FPA Business Hub today!](#)

FPA Open Enrollment is February 1 – 28

FPA members may enroll in **Business Overhead Expense Insurance** (simplified underwriting on the first \$6,000 of elected coverage with one health question), **Group Short-Term and Long-Term Disability Insurance** (guaranteed Issue with no medical questions if not previously declined), and/or **Group Term Life and AD&D Insurance** (simplified underwriting on the first \$50,000 of elected coverage with one health question if not previously declined). To learn more, register for one of the informational webinars on [February 8 at 3 p.m. EST](#) or [February 22 at 3 p.m. EST](#), or visit www.associationinsurancebenefits.com.

Participate in the Annual T3/Inside Information Software Survey

The annual [T3/Inside Information Software Survey](#) has gone live. It's your opportunity to rate the software programs and solutions in your tech stack and provide data for a report that offers user ratings and market share information in different categories. Many advisory firms use the report as a buyer's guide as they consider additions to their office technology. The survey is open from now until early February and it only takes 15-minutes to complete. [Take the survey now!](#)

Discover BHG—Exclusive Financing Partner of FPA

FPA has partnered with BHG to provide our members with easy access to a full suite of fast, hassle-free financial solutions, including business, consumer, and SBA 7(a) loans, as well as credit cards. BHG offers large amounts and extended repayment terms, which can help you make a significant impact on your finances fast—while keeping your monthly payment affordably low. [Want to learn more? Discover BHG.](#)

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.



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