

Take 5

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



February 2023



FPA Retreat 2023: Keynote Speakers Announced!

FPA Retreat traditionally features thought leaders from outside the profession to help you explore thinking and practices that can shape your business and your role as a financial planner. [FPA Retreat 2023](#) will be no different as we have confirmed a [slate of keynote speakers](#) who are sure to enlighten and energize you. Taking place May 1-4 at the Hyatt Regency Coconut Point Resort and Spa in Bonita Springs, Fla., you can register now to join us for the event this year that will leave you wanting more! [Register now to get the lowest currently available registration rate!](#)

FPA is Your One-Stop-Shop for All Your Learning Needs

Staying razor-sharp on financial planning trends and practices makes you a competent financial planner. And while you can get a variety of education from across the financial services industry, nothing compares to the breadth and depth of education you get through the [FPA Learning Center](#). FPA is constantly developing live and on-demand webinars, certificate programs, conference recordings, partner programs, special interest programs, and more to help our valued members stay on top of all they need to know as financial planners. There is a ton of CE to satisfy CFP® CE requirements, and many programs are complimentary—or discounted—with membership. [Check out the FPA Learning Center!](#)

The February Journal of Financial Planning Now Available

FPA members can now read the February issue of the *Journal of Financial Planning* to explore what you need to know when working with divorced or divorcing clients, employee benefits, how to foster digital relationships, planning for health events, liability protection, navigating emotion when selling your RIA, portability, and much more. [Access the latest issue](#) of the *Journal* now.

Take a Brief Member Survey On Title Protection—By March 31!

Today, anyone can call themselves a financial planner without meeting any threshold competency or ethical standards. This state of affairs is confusing and damaging to consumers. FPA would like your input as a member on the potential threshold standards that should be included in a push for title protection. Please take 10 minutes to complete [a brief survey](#) by Friday, March 31, 2023. If you would like additional background information on title protection, please visit the [FPA website](#).

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 are holding a series of virtual town halls 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!](#)

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 dozens of downloadable pieces of content and more is being added regularly. [Access the FPA Business Hub today!](#)

FPA Open Enrollment is NOW OPEN through February 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 an [informational webinar on February 22 at 3 p.m. EST](#), or visit www.associationinsurancebenefits.com.



**Support the Advancement
of Your Profession**

The [FPA Political Action Committee \(FPA PAC\)](#), the only PAC focused on advancing the financial planning profession, provides an important seat at the table, forges relationships with lawmakers and their staffs, and provides an opportunity to share the financial planning story. There is much work to do and every dollar counts. To help us fight for your profession, we ask you to make a contribution to support your FPA PAC. Whether you contribute \$50 or \$5,000, every dollar is appreciated and will support advocacy efforts that move your profession forward.

[Donate Today.](#)