FINANCIAL PLANNING ASSOCIATION

Take 5

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

MARCH 2023

Don't Miss the Must-See Breakout Speakers at FPA Retreat 2023!

Few events challenge your thinking and explore your role as a financial planner like FPA Retreat 2023. That's because each year, FPA Retreat attracts recognized speakers from inside—and outside—financial planning who share transformative ideas and concepts that make you better at what you do. Join us May 1-4 at the Hyatt Regency Coconut Point Resort and Spa in Bonita Springs, Fla., to engage with thought leaders and your peers in a relaxing, inspiring setting. Register now to join us at the lowest possible current rate available. We'll see you there!

JFP Research Quarterly is Coming Soon!

Coming this April, *JFP Research Quarterly* will make the already easily accessible research from the *Journal of Financial Planning* even more accessible. Whether accessed online, digitally, or via print through the *JFP Research Quarterly*, research from the *Journal of Financial Planning* is now accessible when and how you want it. You are encouraged to be sure your mailing address on record at FPA is up-to-date so you don't miss receiving *JFP Research Quarterly* four times each year. This is just the latest example of how FPA strives to create value for you, our members, and help raise awareness of our noble profession to the public.

Elder Planning Specialist Program: First Cohort Starts March 27

FPA and Plan4Life, LLC, are pleased to partner to bring the Elder Planning Specialist Program to FPA members! This first-of-its-kind, 10-week online program is designed to prepare serious financial planners to meet the needs of their older clients. Delivered in a cohort format, the program utilizes experts in several important fields to present meaningful video programs that cover such areas as legal planning, long-term care planning, end-of-life planning, and running a family meeting. The program qualifies for 10 CFP® CE credits and is available to FPA members for $1,195 and nonmembers for $1,495. Participants receive a certificate of completion showing their specialized elder planning training. The first cohort begins March 27, so register soon!

The March *Journal of Financial Planning* Now Available

FPA members can now read the March issue of the *Journal of Financial Planning* to explore the opportunities to build a legacy with 529 plans, the opportunities for retirement savers in SECURE Act 2.0, how to be more effective in your work, the latest in crypto regulations, education funding before and after retirement, the variance in financial plan pricing, and much more. Access the latest issue of the *Journal* now.

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Share Your Thoughts on Title Protection for Financial Planners

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! You can also take a brief survey by March 31!

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!

Delivering Thought Leadership to Help You and Your Business

From practice management and business transitions to tax planning and wellness, wouldn't it be nice to have one dedicated resource you can go to for the latest information from reputable authorities? Well, the FPA Business Hub now makes that resource available to you. The FPA Business Hub is curating the latest content, including whitepapers, research reports, case studies, and more, to help you better serve your clients, teams, and business. New content is being added regularly, so bookmark the FPA Business Hub and see what the experts have to share. Visit www.fpahub.org to get started!