

Take 5

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



APRIL 2023



There's Still Time To Register For FPA Retreat 2023!

[FPA Retreat 2023](#) is not your average financial planning event. It's an immersive experience designed to ignite your creativity, challenge your thinking, and connect you with a tribe of like-minded professionals. But it's not all work and no play at the FPA Retreat 2023. You'll also get to indulge in some seriously fun activities like the "Dining in the Dark" experience and Goofy Golf. Get ready to laugh, unwind, and let your hair down with your fellow planners. So what are you waiting for? [Register for FPA Retreat 2023](#) and get ready for a one-of-a-kind experience that will leave you feeling inspired, empowered, and energized!

Take Your Voice to The Hill During FPA Advocacy Day 2023!

Play a role in educating federal lawmakers on the importance of financial planning and your critical role as a financial planner. Join us in Washington, D.C., June 13-14 for [FPA Advocacy Day 2023](#)! FPA Advocacy Day is an important opportunity for FPA members to continue the dialogue with federal policymakers about the financial planning profession while displaying FPA's strength as the largest membership association for CFP® professionals. Plan for a high-energy, invigorating day that will empower you to interact positively with policymakers to help advocate for issues crucial to you, your business, and your clients. Registration closes on May 15, so [register today!](#)

FPA Announces Substantial Impact By FPA Chapters and Members in 2022

FPA was [pleased to announce](#) that the number of consumers attending financial literacy workshops held by FPA chapters and members in 2022 increased by an impressive 212% from the previous year. This is a significant achievement for the Association's chapters and members that are dedicated to promoting financial literacy and education in communities across the country. Among the FPA chapters reporting financial literacy and pro bono financial planning programming in 2022, 230 workshops were held, attracting 17,302 consumers—up from 5,546 attendees the previous year. FPA chapters and members also reported providing 4,424 consumers with 11,506 hours of pro bono financial planning services by 962 individual FPA members throughout the year.

Read the CEO Quarterly Update To Learn About FPA's Activities in Q1 of 2023

To keep FPA Members and volunteer leaders apprised of what the Association is doing to make FPA a better organization, FPA CEO Patrick D. Mahoney [provides a quarterly CEO Update for Q1 of 2023](#). In the latest installment, Patrick shares an update on some of the ways the Association is working to support members, including the new JFP Research Quarterly, FPA Advocacy Day, the new Elder Planning Specialist Program, and more.

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!](#)

The April Journal of Financial Planning Now Available

FPA members can now read the April issue of the *Journal of Financial Planning* to learn how to remedy potential conflicts of interest, how to audit your processes, the effect of prenuptial agreements on estate planning, the role of financial education on the economy, how to lead an ethical culture, maximizing testimonials in your marketing, and much more. [Access the latest issue](#) of the *Journal* now.

Nominate a Deserving Financial Planner for FPA’s Top Award

FPA is seeking nominations for the [P. Kemp Fain, Jr., Award](#) – the pinnacle of recognition of an exceptional individual who has made outstanding contributions to the financial planning profession. The award honors Fain who was a pioneer in the financial planning profession, blazing trails in professional associations, the CFP® certification, and the profession at-large. Nominations are due April 21. [Nominate someone today!](#)

Kitces Marketing Summit: Common Advisor Marketing Done Uncommonly Well

Take part in the [Kitces Marketing Summit](#) where you’ll have a chance to see what common advisor marketing tactics look like when they are done uncommonly well with unique behind-the-scenes looks at real strategies that attract clients. Taking place virtually April 27 from 12:00 to 4:00 p.m. ET, the Summit will be your place to learn what other professionals are doing to market and grow their business. As a special bonus, FPA members can save \$50 on the purchase of a General Pass by using the discount coupon code: FPAKitces. [Register today!](#)



**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.](#)