

Take 5

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



MAY 2023



You Can Now Register For FPA Annual Conference 2023 – And Save!

It's time to ignite your work and career in Phoenix at [FPA Annual Conference 2023](#)! You'll turn up the heat on your skills and knowledge as a financial planner at one of the biggest gatherings of CFP® professionals each year, from September 27-29, you'll connect with like-minded professionals, explore new trends, and uncover valuable insights that will take you to new heights. Ready to score big-time savings to join us in Phoenix? Register now with early bird pricing that will help you attend at the lowest possible ticket price. [It's a no-brainer, so register today!](#)

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!](#)

Unlock The Keys To Sustainable Growth For Your Practice

Are you a financial adviser struggling to grow your business? You're not alone. Recent research by FPA and Janus Henderson revealed that 46% of advisers are comfortable with their current growth rate, but only 12% strongly agree with that sentiment. The good news is the same research identified six keys to growth for today's advisory practices. The [Six Keys to Growth for Today's Adviser](#) report will help you learn about the critical factors for business growth that were uncovered in the research. Get your hands on the Six Keys to Growth for Today's Adviser report today and start putting your business goals within reach! [Get the report!](#)

Join FPA Leaders for the 'State of FPA' Virtual Update on June 21

Are you eager to stay in the loop on the exciting initiatives and updates taking place within FPA? Join our "State of FPA" Virtual Update on June 21 at 4 p.m. ET (1 p.m. PT) where we'll bring you an exclusive inside look at the work FPA has been doing to drive maximum value for you. Plus, we'll be revealing two highly anticipated reports: the 2022 FPA Annual Report and the 2022 audited financial statements. Don't miss out on this fantastic opportunity to stay up-to-date on your membership Association. [Register now!](#)

The May Journal of Financial Planning Now Available

FPA members can now read the May issue of the *Journal of Financial Planning* to learn about the impact of recent tax changes on small businesses, cultivating the next generation, business valuation, advising business owners on health-related financial risks, human risk management, the arithmetic of Roth conversions, and much more.

[Access the latest issue](#) of the *Journal* now.

Apply For The 2024 FPA Board of Directors

Are you ready to take your leadership to the next level? FPA is seeking exceptional individuals like you to join our esteemed Board of Directors. As a member of the FPA Board of Directors, you'll have the unique opportunity to shape the future of financial planning and make a lasting impact on the profession. Your vision, insights, and strategic contributions will help drive the direction of FPA and influence key decisions that shape the profession. You'll have a platform to voice your ideas, drive innovation, and contribute to the growth and success of FPA and our Members. [Apply today!](#)

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](#). 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!](#)

FPA and CNBC Co-Branded 'Money Matters' newsletter

Want the latest investments and personal finance headlines delivered to your inbox twice each month? FPA and CNBC are collaborating to publish the co-branded *Money Matters* newsletter exclusively for FPA members. Delivered twice each month, the newsletter delivers the latest headlines from CNBC that you need to read. [Opt-in for Money Matters now!](#)



**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.](#)



CARSON
COACHING



FPA Partner Spotlight

Continuous learning and growth are essential to success in today's competitive landscape. That's why we are thrilled to have **Carson Coaching** as FPA's official coaching partner. As an FPA Member, you have access to Carson's innovative coaching programs that can take your business to new heights.

Carson Coaching is renowned for its business and leadership coaching expertise, and has helped thousands of advisers super-charge their growth.

As an FPA Member, **you can enjoy a wealth of benefits**, including:

- Complimentary access to **Carson Coaching Online** — a cutting-edge platform with hundreds of professional development resources.
- Complimentary monthly virtual **Group Coaching** that explores business-building topics and helps you overcome challenges and seize opportunities.
- Exclusive FPA Member discounts for Carson's leading programs and events, including **One-on-One Executive Business Coaching**, the **Emerging Advisor Growth Accelerator Program**, and **regional and national events**.

Scan the QR code below to take advantage of this incredible opportunity and **unlock your business success with Carson Coaching**.



"We've seen the tremendous impact coaching can have in supporting financial planners as they move through the profession; we look forward to our partnership with FPA and share in their commitment to move the industry forward. A better business means a better experience and service to our clients, which is why we are all in this profession – to serve others."

Jamie Hopkins
Managing Partner of Wealth Solutions
Carson Group

SCAN ME

