

Take 5

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



JUNE 2023

Act Now! Secure Your Spot at FPA Annual Conference 2023 – and Unlock Exclusive Savings!

Join us in Phoenix from September 27-29 and set your career ablaze at [FPA Annual Conference 2023](#)! This premier event brings together the brightest minds in financial planning, offering you the ultimate opportunity to enhance your skills and knowledge. You'll immerse yourself in a vibrant community where you'll forge invaluable connections, delve into cutting-edge trends, and gain priceless insights that will propel you to unprecedented success. Seize the moment and take advantage of our early bird pricing, ensuring you snag your ticket at the most affordable rate possible. This offer is too good to pass up! [Register today](#) to secure your place at this game-changing conference.



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!](#)

How Does Technology Build Client Relationships? Help Us Find Out.

More consumers today are engaging in the planning process, monitoring their plans, and viewing their investments in real-time through client-facing technologies. But how these technologies align with subjective client outcomes is unknown. eMoney and FPA are conducting new research to learn how financial planning technology is evolving with client-planner relationships. This survey takes 15 minutes to complete, and participants will be included in a drawing to *win one of two complimentary registrations (an \$899 value) to attend FPA Annual Conference 2023* in Phoenix, Arizona, from September 27-29. [Take the survey](#) by June 21 to be entered in the drawing!

The June Journal of Financial Planning Now Available

FPA members can now read the June issue of the *Journal of Financial Planning*, powered by Allianz, to learn about the results from the 2023 Trends in Investing survey, how to build the right team, streamlining financial planning with ChatGPT, empowering next generation planners, advising women in estate planning, multiphase withdrawal strategies, and much more. [Access the latest issue](#) of the *Journal* now.

Where are Financial Pros Investing Now? This Report Lets You Know.

Discover the latest insights from the 2023 Trends in Investing Survey conducted by FPA and the *Journal of Financial Planning*. Dive into the investment preferences of over 190 financial professionals as they navigate the ever-changing investment landscape. While new opportunities arise, financial advisers maintain a strong preference for proven investment vehicles. Explore the survey's findings on alternative investments and the growing interest in exchange-traded funds (ETFs). [Check out the 2023 Trends in Investing Survey report now!](#)

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!](#)



**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.](#)



American Heart Association.



FPA Partner Spotlight

The **American Heart Association (AHA)** and FPA have joined forces to empower financial planners on the profound impact of charitable giving and the repercussions of financial stress. This transformative collaboration positions FPA Members to revolutionize the lives of their clients and positively influence those touched by esteemed charitable organizations like the American Heart Association.

FPA and the AHA believe in the importance of philanthropy. By providing education and a referral program, FPA Members are seamlessly connected with individuals and families eager to support philanthropic endeavors.

As an FPA Member, you can directly benefit from the following:

- The [Philanthropic Solutions in Financial Planning Certificate Program](#): Supporting your work advising clients on philanthropic giving.
- Inclusion in the [AHA Professional Advisor Network](#): Upon completion of the certificate program, you are included in this network for potential client referrals, year-round resources and planning tools, networking opportunities and more.
- Access to On-Demand Education: Gain CFP® CE credit with the [Family Philanthropic Conversations with Clients](#) webinar.
- Access to Upcoming Live Education: Gain CFP® CE credit with the upcoming [Secure Act 2.0: QCDs to CRTs and CGAs](#) webinar.



“By providing professional education to FPA Members, they will be equipped to advise the next generation of philanthropic supporters to make informed charitable decisions that will significantly transform and save lives for generations to come.”

Bertram Scott
Immediate Past Chairman
American Heart Association

LEARN MORE!



[HEART.ORG/ADVISOR](https://heart.org/advisor)