

Take 5

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



JULY 2023

Supercharge Your Success at FPA Annual Conference 2023!

If you're hungry for knowledge, eager to level up your skills, and passionate about growing your business and serving your clients, then [FPA Annual Conference 2023](#) is your ticket to something truly extraordinary. At FPA Annual Conference 2023, connection, learning, and community take center stage. It's where you'll rub shoulders with the brightest minds, exchange ideas, and discover the latest strategies that will supercharge your success. It's an experience like no other, and it's tailor-made for YOU. Don't miss out on this extraordinary opportunity. Join us Sept. 27-29 in Phoenix—and [SAVE with advanced pricing when you register now!](#)



The 2022 FPA Annual Report is Now Available

Over the past year, FPA leaders and staff worked hard to make the Association your partner in planning through Practice Support, Learning, Advocacy, and Networking. Learn about those efforts and the many programs, services, and events that are driving the value of membership in the recently-released 2022 FPA Annual Report. The report offers a look at the many ways FPA is working for you and includes an update on membership and the 2022 audited financial statements. [Read the 2022 FPA Annual Report now.](#)

The July Journal of Financial Planning Now Available

FPA members can now read the July issue of the *Journal of Financial Planning* to learn about helping clients build resilience in retirement, strengthening the roots of your business, breaking barriers between wealth and retirement planning, defining your client journey, disability insurance, and much more. Access the latest issue of the [Journal now.](#)

Fulfill Your IAR CE Obligation with Kitces IAR CE Day on August 24

Kitces IAR CE Day is the ultimate solution for Investment Adviser Representatives (IARs) fulfilling their [CE obligations](#). Join us on August 24 for virtual sessions led by experts in ethics and regulation, earning your 6 hours of IAR Ethics CE while also gaining 6 hours of CE for CFP®, CIMA, CPA, and other designations. No vendors or sponsors, just pure, high-quality content. Plus, part of your registration will be sent to your local FPA chapter to support other programs that support YOU. Don't miss out! [Register today](#) for \$199 (general admission) or \$129 (Kitces Premier members).

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!](#)

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!](#)

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.](#)



FINANCE of AMERICA
- REVERSE -

FPA Partner Spotlight

Finance of America Reverse (FAR) and FPA have formed an impactful partnership to educate financial planners about the potential benefits of reverse mortgages as part of a comprehensive financial plan. As one of the largest reverse mortgage lenders in the U.S. and a leading provider of retirement solutions, FAR and its experts have joined forces with FPA to support you.

FAR and FPA believe financial planners must continually question, adapt, and develop new ways to serve their clients' best interests and transform lives through comprehensive financial planning. This partnership aligns with your aspiration to be a modern, forward-thinking financial planner.

As an FPA Member, you can take advantage of the following benefits today:

- **The FAR Learning Hub:** Enroll in [comprehensive courses](#) designed to help you master the intricacies of reverse mortgages, including who can benefit and how they can be integrated to enhance and safeguard retirement plans.
- **FAR Educational Resources:** Explore a wide variety of informational resources and innovative tools available through the [FPA Business Hub](#). These resources are specifically tailored to optimize client retirement outcomes.



"Teaming with FPA is a logical extension of FAR's ongoing educational efforts and is particularly exciting because it provides another touchpoint to reach a critically important player in many Americans' lives when it comes to retirement - the financial planner."

Kristen Sieffert
President
Finance of America Reverse, LLC

LEARN MORE!

