

Take 5

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



AUGUST 2023

Unleashing the Marketing Edge: Seizing Opportunities for Growth

FPA Annual Conference 2023 | Sept. 27-29 | Phoenix, Arizona

Marketing Your Business Takes Center Stage at FPA Annual Conference 2023

Suppose you want to learn what you must do today to market your business for sustained success. In that case, we have a golden opportunity for you at [FPA Annual Conference 2023](#) in Phoenix from Sept. 27-29. Join us for a can't-miss keynote panel discussion featuring three of the best minds in financial planner marketing, including Samantha Russell, Diana Cabrices, and Penny Phillips—and moderated by Justin Mack of *Financial Planning* magazine. You'll discover innovative approaches, digital tools, and compelling narratives to help you stand out! [Register today because this is an event you won't want to miss!](#)

Stay Ahead in the Fast-Moving World of Alts With UniFi By CAIA™

A new partnership between FPA and the Chartered Alternative Investment Analyst (CAIA) Association is bringing you greater access to innovative educational resources with UniFi by CAIA™. Designed for financial professionals like you, UniFi by CAIA™ offers you discounted access to a digital-first series of educational offerings. Unlock the potential of alternative investments and expand your expertise with relevant microcredentials, including private debt and digital assets. Plus, get ready for enhancements to the FAI Certificate Program. Visit the FPA Marketplace today and seize this opportunity to elevate your financial planning capabilities and open doors to new possibilities. [Learn more!](#)

The August Journal of Financial Planning Now Available

FPA members can now read the August issue of the *Journal of Financial Planning* to learn about strategies for growth, creating a personal brand, sustainable business models in financial planning, succession planning, financial planner well-being, 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).

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of Your Profession**

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