



FINANCIAL  
PLANNING  
ASSOCIATION

# Take 5

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



SEPTEMBER 2023

## FPA Advocating for Tomorrow's Workforce

FPA joined with more than 500 trade associations, professional societies, businesses, and employers to form the Tomorrow's Workforce Coalition, established to build support for the Freedom to Invest in Tomorrow's Workforce Act (S. 722 / H.R. 1477). This bipartisan, bicameral legislation would expand qualified expenses under 529 savings plans to include postsecondary training and credentialing, such as licenses and professional certifications. Learn more about this important advocacy effort and the role FPA is playing as part of the Tomorrow's Workforce Coalition. [Read the announcement.](#)

## 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 September Journal of Financial Planning Now Available

FPA members can now read the September issue of the *Journal of Financial Planning* to learn about cryptocurrency compliance, time management and productivity, marketing, unclogging your prospect pipeline, the impact of caregiving on retirement plans, and more. Access the latest issue of the [Journal now.](#)

## Delivering Thought Leadership to Help You and Your Business

From practice management and business transitions to tax planning and wellness, wouldn't it be nice to have one dedicated resource you can go to for the latest information from reputable authorities? Well, the FPA Business Hub makes that resource available to you. The FPA Business Hub is curating the latest content, including whitepapers, research reports, case studies, and more, to help you better serve your clients, teams, and business. New content is being added regularly, so bookmark the FPA Business Hub and see what the experts have to share. Visit [fpahub.org](http://fpahub.org) to get started!

## Connect with Your Community with FPA Knowledge Circles

Like all financial planners, you have specific interests that are significant to you personally and professionally. As your partner in planning, FPA provides opportunities to drive those interests. Through FPA Knowledge Circles, you and other FPA members can coalesce around shared interests and connect globally with peers. These vibrant communities offer you an opportunity to engage in discussion, hear from experts, and build valuable connections. With 15 unique communities on planning-focused or community-based topics and issues, there is a Knowledge Circle for you. [Learn more!](#)

## 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!](#)

## 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!](#)



**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.](#)**