



FINANCIAL
PLANNING
ASSOCIATION

Take 5

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



OCTOBER 2023

New Research: The Transformative Power of Technology on Client Relationships

Unlock the potential of financial technology and supercharge your financial planning practice with the transformative power of client portals. Discover the key findings from groundbreaking research by eMoney Advisor and FPA, revealing how Portal Power Users experience reduced financial anxiety, increased client trust, motivation, referrals, loyalty, and higher client satisfaction. Embrace the future of financial planning today and elevate your client relationships like never before. [Access the report now!](#)

Achieve Media Mastery with the New FPA Media Training Program

Step into the media spotlight with FPA's new on-demand Media Mastery 2.0. Developed with AdvisorPR and hosted exclusively on the FPA Learning Center, this program equips you with the tools to master media engagement. Explore public relations fundamentals, how to create media-facing materials, and discover interview best practices. Accessible anytime, anywhere, the first module is free for FPA members, and Modules 1-4 are available to FPA members for \$99 and nonmembers for \$199. Supercharge your media presence and make an impact today! [Get started!](#)

FPA Members Get Complimentary Access to TIFIN Wealth

We were excited to announce a new partnership recently with TIFIN Wealth to support the growth of independent financial planners by providing access to TIFIN's personalized investment platform at no cost for FPA members who manage under \$100M in AUM. This member benefit aims to empower FPA members with cutting-edge tools and resources to better serve their clients while making innovative investment technology more accessible. [Learn more now!](#)

The October Journal of Financial Planning Now Available

FPA members can now read the October issue of the *Journal of Financial Planning* to learn about tax planning, making the move from practitioner to CEO, the role of AI in building rapport and trust, estate planning, leadership and the work-life balance, delivering the right messages to the right people through drip marketing, and much more. Access the latest issue of the [Journal now.](#)

Don't Miss Out on FPA E&O, Cyber Liability, and E&O Insurance!

Protect yourself and your business with E&O and cyber liability insurance, including social engineering coverage and bonds.. Call today and speak with a licensed benefits counselor or apply for coverage. Provided by Ryan Insurance Strategy Consultants powered by Gallagher Affinity. [Get started.](#)

Get Started with Video Marketing That Makes a Difference!

Want to start video marketing but can't seem to make the leap? You don't have to do it alone. The Idea Kit team guides you through every step of the process and does all the heavy lifting, including building you a video marketing playlist, crafting custom scripts, and sending you the gear you need. If your goal is to engage prospects and convert them to clients or nurture your existing client relationships, then Idea Kit is for you. [Learn how you can get 10% of all their video services today!](#)

FPA Board Election Results Announced

FPA [announced](#) on Sept. 27 that the Board of Directors elected Paul Brahim, CFP®, as the 2024 FPA President-elect for a one-year term. Brahim's term will begin Jan. 1, 2024, succeeding incoming 2024 FPA President Claudia Cypher Kane, CFP®. Brahim is managing director and senior vice president at Wealth Enhancement Group in Pittsburgh, Pa., and has served as an impactful leader of the FPA of Pittsburgh chapter.

Daniel Galli, CFP®, who has served on the Board for the past two years, was selected to serve as the 2024 FPA Treasurer. Next year, Galli will complete his third year of Board service and will also serve as the volunteer leader of the FPA Finance Committee.

FPA is also pleased to announce the election of three new members to its Board of Directors, including Lisa Kirchenbauer, CFP® (FPA of the National Capital Area), Celeste Revelli, CFP® (FPA of the Philadelphia/Tri-State Area), and Timothy Todd, Ph.D. (FPA of Central Virginia).



**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.](#)