



FINANCIAL
PLANNING
ASSOCIATION

Take 5

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



NOVEMBER 2023

Registration Is Now Open for FPA Retreat 2024

Join us May 6-9, 2024, in Tucson, Ariz., at the Loews Ventana Canyon Resort for a unique experience that gets you out of your comfort zone. [FPA Retreat 2024](#) is for passionate financial planners who are eager to embrace change and challenge conventional wisdom. It's an event where you'll explore new horizons and participate in essential conversations that truly matter. So, if you're ready to be a part of a vibrant, forward-thinking community, join us at FPA Retreat 2024. [Save now on your registration with special early bird pricing!](#)

Celebrating 50 Years of CFP® Certification

Join us for a look back at the first 50 years of CFP® certification! Ben Coombs, a member of the first CFP® class in 1973, and Lew Walker, a member of the third CFP® class in 1975, share their stories in this video we debuted at FPA Annual Conference 2023 in Phoenix. [Watch the video!](#)

CFP Board Wants to Hear from You on Proposed Changes to Sanction Guidelines and Fitness Standards

CFP Board wants [your input](#) on proposed changes to its Sanction Guidelines and Fitness Standards that provide guidance on the sanction that might apply to particular misconduct and specific character and fitness standards for candidates for CFP® certification and professionals eligible for reinstatement. While comment letters will be accepted, you can provide your feedback easier than ever with their online survey! It is recommended that you complete the survey by putting yourself in the shoes of the respondent at issue in the survey question and answer from that lens. FPA provided comments on prior proposed changes in 2021, again on related disciplinary changes later that year, and advocated for its members earlier this year regarding Procedural Rules governing the processes for investigating and enforcing alleged misconduct. View those [FPA comment letters](#). Please participate in CFP Board's [survey](#) by December 3.

The November Journal of Financial Planning Now Available

FPA members can now read the November issue of the *Journal of Financial Planning* to learn about planning for special needs, how to draft a blueprint for business, helping female clients achieve financial independence, mastering emotional conversations, succession planning, couples and insurance, revisiting William Bengen's "SAFEMAX" portfolio withdrawal rate, and much more. Access the latest issue of the [Journal now](#).

New Research Reveals How Client Portals Can Revolutionize Financial Planning

Elevate your practice and redefine client relationships with cutting-edge client portals. Dive into the game-changing insights from groundbreaking research by eMoney Advisor and FPA, revealing that Portal Power Users experience reduced financial anxiety, heightened trust, motivation, referrals, loyalty, and soaring client satisfaction. Embrace technology's potential now to shape your financial planning success and transform your clients' financial well-being. [Access the report now!](#)

FPA Insurance Program: Protecting You and Your Business

As your partner in planning, FPA wants to help you protect your business and employees through a variety of insurance programs that are exclusively offered to our valued members. Learn about the full menu of programs available to you, including Group Medical Plans, Group Long-Term Disability, Group Short-Term Disability, Group Term Life and Accidental Death and Dismemberment, Group Vision, Group Dental, Business Overhead Expense, Errors and Omissions Insurance, Cyber Liability and Data Breach Insurance, Investment Advisor Surety Bond, among others. All FPA insurance programs are offered through Ryan Insurance Strategy Consultants, one of the profession's leading providers of insurance services. [Learn more.](#)

Become a Media Maestro with Media Mastery 2.0

Step confidently into the media spotlight with FPA's new on-demand [Media Mastery 2.0](#). Created in collaboration with AdvisorPR and exclusively hosted on the FPA Learning Center, this comprehensive program empowers you with the skills to master media engagement. Explore PR essentials, craft compelling media materials, and learn the art of successful interviews. 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. Elevate your media presence and start making a lasting impact today! [Dive In!](#)



**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.](#)