



FINANCIAL
PLANNING
ASSOCIATION

Take 5

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



DECEMBER 2023



RETREAT

Get Ready for FPA Retreat 2024: Secure Your Spot Today!

Mark your calendars for May 6-9, 2024, as we invite you to Tucson, Arizona, at the stunning Loews Ventana Canyon Resort. [FPA Retreat 2024](#) is your gateway to an exceptional journey, designed to push boundaries and question the status quo. FPA Retreat 2024 is all about exploring uncharted territories and engaging in conversations that truly count. If you're eager to be part of an innovative and forward-thinking community, then this event is tailor-made for you. Don't miss out on this opportunity to save with our special early bird pricing. [Register now and secure your spot!](#)

Now Available: FPA-Branded Apparel

Elevate your fashion game with the latest and greatest in FPA-branded apparel! The FPA Merchandise Store offers a range of FPA-themed gifts and accessories that are sure to impress. From stylish clothing to premium notebooks and bags, the FPA Merchandise Store is just a click away. Our online platform ensures a seamless shopping experience, allowing you to browse and purchase your favorite items from the comfort of your home or office. [Check out all that's available in the FPA Merchandise Store!](#)

The December *Journal of Financial Planning* Now Available

FPA members can now read the December issue of the *Journal of Financial Planning* to learn about LTCI rate increases and reduced benefit options, goal setting and strategic planning, the role of AI in financial planner operations, taxes and widowhood, insights from FPA Annual Conference 2023, and much more. Access the latest issue of the [Journal now](#).

Unlock Your 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 best interview 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. Elevate your media presence and make an impact today! [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!](#)

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!](#)

Become a Contributor to TheStreet.com!

Bob Powell, CFP®, RMA®, a seasoned journalist and co-founder of finstream.tv, is extending an invitation to FPA members to share their expertise with the readers of Retirement Daily on TheStreet.com. As a financial journalist specializing in retirement issues, Bob is convinced that Retirement Daily offers an invaluable platform for financial planners to both enhance their personal brand and educate consumers. It's a golden opportunity for FPA members to showcase their expertise, enhance their visibility, build goodwill, and expand their client base. If you are interested in contributing articles on topics such as optimizing retirement savings, risk management, or any other pertinent subject, please send Bob an email at retirementweekly@gmail.com.



**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.](#)