



FINANCIAL  
PLANNING  
ASSOCIATION

# Take 5

An update on the programs and services that make FPA *your partner in planning*<sup>™</sup>



January 2024



## Kick Off Your New Year with Early Bird Registration for FPA Retreat 2024!

Join us for FPA Retreat 2024 from May 6-9 at the picturesque Loews Ventana Canyon Resort in Tucson, Arizona. You'll participate in an extraordinary journey that will inspire fresh perspectives and challenge conventional norms. If you're excited about being part of an inventive and future-focused community, then FPA Retreat 2024 is just for you. Register by January 29 to take advantage of special early bird pricing—the lowest possible registration rate you'll find! [Register now!](#)

## Read the CEO Quarterly Update to Learn About FPA's Activities in Q4 of 2023

To keep FPA Members and volunteer leaders apprised of what the Association is doing to support members and elevate the profession, FPA CEO Patrick D. Mahoney provided a quarterly CEO Update for Q4 of 2023. In the latest Update, Patrick celebrates the 50th anniversary of the CFP® certification, and highlights some of the newer programs, initiatives, and member benefits. [Read the CEO Update now.](#)

## The January Journal of Financial Planning Now Available

FPA Members can now read the January 2024 issue of the *Journal of Financial Planning* to learn about increasing client savings rates, growing their business through client segmentation, cryptocurrency, mentorship for the next generation of financial planners, the intersection of fintech and behavioral finance, the role of self-disclosure, factor exposure, and much more. Access the latest issue of the [Journal now.](#)

## Empowering You and Your Business in the New Year

As we embark on a fresh year, filled with opportunities and growth, imagine having a dedicated source for cutting-edge information on practice management, business transitions, tax planning, and well-being. Look no further, as the FPA Business Hub is here to provide just that. Our hub offers the latest thought leadership, including white papers, research reports, case studies, and more, ensuring you stay ahead with insights from reputable authorities. Bookmark the FPA Business Hub and explore the wealth of knowledge available to you. Start the year right by visiting [www.fpahub.org](http://www.fpahub.org)!



## Unlock Exclusive Savings with the FPA Marketplace

Experience unparalleled savings as a valued FPA member with the FPA Marketplace, powered by the Chalice Network®. Delve into a wealth of benefits tailored to you—professionally and personally. You'll find everything you need, including various insurance programs, savings on fintech, and more. You also have access to BenefitHub, where you can tap into potential savings totaling thousands of dollars across an extensive array of services and programs. Benefit from top-notch offerings from Verizon, Costco, Geico, Avis, Hertz, Disney, AMC, Gap, and more. [Access the FPA Marketplace now!](#)

## 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 investment technology more accessible. [Learn more now!](#)

## 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!](#)

## FPA Wins Two LUMINARIES Awards from ThinkAdvisor

Each year, *ThinkAdvisor* recognizes outstanding organizations and individuals in the financial services industry with their annual LUMINARIES Awards program. FPA was honored to win two awards this year in the areas of Community Impact and Thought Leadership/Education. This recognition is a tremendous honor and is due to the hard work and dedication of FPA Members, chapters, volunteer leaders, and professional staff. [Learn more about the LUMINARIES Award.](#)



**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!](#)**

