



FINANCIAL
PLANNING
ASSOCIATION

Take 5

An update on the programs and services that make FPA *your partner in planning*[™]



February 2024



Hurry! Advance Registration Deadline for FPA Retreat 2024 Ends February 26!

Be part of [FPA Retreat 2024](#) from May 6–9 at the stunning Loews Ventana Canyon Resort in Tucson, Arizona. FPA Retreat is an immersive event that pushes your boundaries and sparks your thinking. If you crave a community that's always looking ahead, FPA Retreat 2024 is THE event for you. But act fast by registering by February 26 to attend with discounted advance pricing. This is your opportunity to lock in the best registration rate to join us in Tucson!

[Register now!](#)

FREE WEBINAR! Ed Slott's Top 2024 Tax-Season Conversations for Your Clients' Retirement Savings

Position yourself as a proactive financial planner with insights from America's IRA Expert, Ed Slott, CPA. Join us on March 7 at 2:00 p.m. ET for a free webinar with Ed Slott when he shares how you can navigate larger 2024 Required Minimum Distributions and tackle the #1 RMD mistake. You'll learn how to seize limited-time tax opportunities for high-income clients and explore new charitable planning strategies, including the TRIPLE WIN solution. Act now to set yourself apart in retirement planning with actionable insights from the foremost authority, Ed Slott. [This special webinar is free for all, so register now!](#)

The February Journal of Financial Planning Now Available

FPA Members can now read the February 2024 issue of the *Journal of Financial Planning* to learn about soft skills for the augmented adviser, the skills of women in wealth management, artificial intelligence and client health, the risks of delaying Social Security, consumer attitudes on long-term care, and much more. Access the latest issue of the [Journal now.](#)

FPA Open Enrollment Is February 1 – 29

FPA members may enroll in a wide range of insurance programs through our friends at Ryan Insurance Strategy Consultants, including Business Overhead Expense Insurance, Group Short-Term and Long-Term Disability Insurance, and/or Group Term Life and AD&D Insurance. To learn more, visit [associationinsurancebenefits.com](https://www.associationinsurancebenefits.com).



FPA PAC Shares End-of-Year Report for 2023

The FPA Political Action Committee (FPA PAC) is pleased to share a glimpse into its work over the past year, made possible by the unwavering support of FPA Members nationwide. In the FPA PAC 2023 Year-End Report, you'll learn about FPA PAC's focus, how it supports the financial planning profession, a new policy on PAC contributions to political campaigns, key metrics that matter, and more. You'll also learn about FPA PAC's top contributors and how you can help advance FPA PAC's mission in the year ahead. [Access the report.](#)

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!](#)

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!](#)



**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.

