



FINANCIAL
PLANNING
ASSOCIATION

Take 5

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



March 2024



Don't Forget to Register for FPA Retreat 2024!

Join us at [FPA Retreat 2024](#), taking place from May 6-9 at the breathtaking Loews Ventana Canyon Resort in Tucson, Arizona. Take part in an event designed to challenge your limits and ignite your business. If you seek a forward-thinking community, FPA Retreat 2024 is the must-attend event for you. Don't miss out on the chance to join us for this unforgettable experience in Tucson. [Reserve your spot now!](#)



Registration for FPA Annual Conference 2024 Is Open!

Are you eager to learn, grow, and take your business to new heights? If yes, you want to attend [FPA Annual Conference 2024](#). It's about connecting with like-minded people, learning from the best, and building a strong community. You will meet some of the brightest minds in the profession, share your ideas, and explore new strategies to achieve the next level. It's unique and custom-made for you, so don't let it pass you by. [Register now for early bird pricing and join us in Columbus from Sept. 18-20!](#)

Contribute Your Expertise By Sharing How You're Investing!

Share your expert thoughts on investing to help shape the content of the June issue of the *Journal of Financial Planning*. Conducted since 2006, the annual Trends in Investing Survey takes no more than seven minutes to complete. The results of this highly-anticipated research will reveal industry-shaping trends affecting you and your clients. [Take the survey today.](#)

The March *Journal of Financial Planning* Now Available

FPA Members can now read the March 2024 issue of the *Journal of Financial Planning* to learn about answering clients most taxing education questions, creating an excellent client experience, preparing young adults for financial independence at college, considerations for new planners, strategic networking, the benefits of behavioral nudges, working with widows, client segmentation, and much more. Access the latest issue of the [Journal now.](#)



Connect With Your Peers On the All-New FPA Connect!

Welcome to the next generation of connecting with your financial planning community! The all-new FPA Connect platform is your all-in-one source of connection with FPA members. The upgraded platform features a homepage with an activity feed to make following discussions easier than ever. The improved community library provides easier navigation to find what you want – when you want it. Knowledge Circles, the All-Member Open Forum and your different communities are better than ever. Access to the new FPA Connect is just another great benefit of FPA membership. [Check it out today!](#)

Elder Planning Specialist Program: Next Cohort Starts March 18

FPA and Plan4Life, LLC, are partnering to bring the [Elder Planning Specialist Program](#) to FPA members! This 12-week online program is designed to prepare serious financial planners to meet the needs of their older clients. Delivered in a cohort format, the program utilizes experts in several important fields to present meaningful video programs that cover such areas as legal planning, long-term care planning, end-of-life planning, and running a family meeting. The program qualifies for 10 CFP® CE credits and is available to FPA members for \$1,195 and nonmembers for \$1,495. Participants receive a certificate of completion showing their specialized elder planning training. [The next cohort begins March 18, so register soon!](#)

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.](#)



**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.





FPA Partner Spotlight

As an FPA member, you can now enjoy complimentary access to **TIFIN Wealth's personalized investment proposal platform**. This member benefit is designed to help you enhance client engagement, simplify goals-based planning, and identify financial personality – at no cost to you.

What's in it for you?

- Generate proposals quickly and easily based on advanced, fact-based risk alignment that helps your clients make informed investment decisions that align with their risk tolerance.
- Create proposals quickly and easily using simple, conversational workflows that are easy for your clients to understand.
- Tailor investment proposals to your clients' unique needs and preferences via scientific financial personality assessments.

And here is the special offer for you.

If you manage under \$100M in AUM, you can enjoy complimentary access to TIFIN Wealth's platform. If you're over that threshold, you can still access a 20% discount on the platform.

- ▶ Do you manage under \$100M in AUM? [Claim your free access.](#)
- ▶ Do you manage more than \$100M in AUM? [Claim your 20% discount.](#)

TIFIN Wealth incorporates client information about planning goals, risk capacity, and financial personality to generate proposals in minutes. [Sign up today!](#)



"We recognize the vital role that financial planners play, and we are dedicated to supporting their growth and success. Through this partnership, we aim to level the playing field and create opportunities for them to thrive in an increasingly competitive landscape."

AJ Boury
Chief Operating Officer
TIFIN Wealth

