



FINANCIAL
PLANNING
ASSOCIATION

Take 5

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



April 2024



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!](#)

Read the CEO Quarterly Update To Learn About FPA's Activities in Q1 of 2024

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 Q1 of 2024. In the latest Update, Patrick highlights the new 10-year strategic vision for the Association and provides details on some recent announcements. [Read the CEO Update 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!](#)

The April Journal of Financial Planning Now Available

FPA Members can now read the April 2024 issue of the *Journal of Financial Planning* to learn about serving clients with cognitive decline, serving the next generation of clients, finding a sense of community, using AI in financial planning, marketing during tax season, assessing the impact of virtual client meetings, and much more. Access the latest issue of the [Journal now.](#)



Register Now for FPA NexGen Gathering 2024 in Phoenix!

Join us at [FPA NexGen Gathering 2024](#) in Phoenix from August 20-22. This event is specifically designed for the next generation of financial planning professionals, providing opportunities to engage in thought-sharing conversations, earn CE, and feel empowered about the change you and your peers can bring to the profession. Don't miss out on this chance to network with like-minded professionals and gain valuable guidance to help take your career to the next level.

[Register now and invest in your future!](#)

Enjoy Complimentary Access to TIFIN Wealth with Your FPA Membership

We are thrilled to share our partnership with TIFIN Wealth, which aims to support the growth of independent financial planners. As part of this collaboration, FPA members who manage under \$100M in AUM can access TIFIN's personalized investment platform at no cost. This benefit provides you with advanced tools and resources to better serve your clients, while also making innovative investment technology more widely available. [Learn more.](#)

Stay Ahead of the Curve with the FPA Business Hub

Staying ahead in the business world is crucial for success, and what better way to do that than by gaining insights from reputable authorities? By bookmarking the FPA Business Hub, you'll gain access to a wealth of knowledge that will help you stay informed and make informed decisions for your business. Don't miss out on this opportunity to stay ahead of the curve. Visit www.fpahub.org today and start taking your business to the next level!

Unlock Your Media Mastery with FPA's Media Training Program

Step into the media spotlight with FPA's 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!](#)



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.

**Support the Advancement
of Your Profession**





COLLEGE FOR
FINANCIAL PLANNING®
A KAPLAN COMPANY



FPA Partner Spotlight

Are you looking to take your financial planning career to the next level?

Look no further than the College for Financial Planning®—a Kaplan Company.

FPA is pleased to partner with the College for Financial Planning®—a Kaplan Company, a premier financial services education provider that offers industry-leading programs that give you the knowledge, skills, and credentials you need to succeed.

Whether you are beginning a financial career, looking to gain expertise through a specialization or pursuing the highest level of the CFP® mark or Masters in Personal Financial Planning, their online programs help you succeed at every stage of your career.

Their adaptive curriculum evolves with the industry, bringing you groundbreaking programs in areas such as behavioral finance, wealth management for sports and entertainment professionals, and more. Learn from expert faculty with more than 150 years of combined industry experience. Empower yourself today to build a secure and rewarding career in financial planning.

FPA members can save 15% on eligible Kaplan, Inc. programs in the following areas of study:

- Financial Education Programs, including Professional Designation Programs, Master of Science in Personal Financial Planning, and CFP® Certification Education, Exam Prep, and Continuing Education.
- Insurance Licensing and Continuing Education
- Securities Licensing
- Advanced Designations in Investment Management

FPA members can get started today at kaplan.com/fpamembers.



"Decades after the College launched the education program that led to the creation of the CFP® certification, financial education continues to be our mission. Whether you are just launching a career or looking to solidify your expertise, our programs now include CFP® certification education and exam prep, graduate degree programs, and professional designation programs and certificates to meet professionals wherever they are and help them continue to build rewarding careers in the ever-changing world of financial advising."

Dirk Pantone
President, College for Financial Planning®—a Kaplan Company

SCAN ME

