



# FPA PAC

## Q2 2024 DEBRIEF

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FPA Political Action Committee (FPA PAC) | [fpapac.org](https://fpapac.org)

Skip Schweiss, CFP®, AIF®  
Chair, FPA Political Action Committee



# FPA PAC BOARD NEWS



## Evelyn Zohlen, CFP®, Assumes FPA PAC Board Treasurer Role

The FPA Political Action Committee (FPA PAC) is pleased to announce that Evelyn Zohlen, CFP®, a long-time FPA PAC Board Member and supporter, will serve as the FPA PAC's Treasurer for the remainder of 2024. Evelyn will take over this important role from Frank Paré, CFP®, who has officially stepped down from the Board. The FPA PAC Board would like to thank Frank for his years of service and Evelyn for volunteering to take on this important role!

## FPA PAC AT FPA EVENTS!



Lance Eaton, CFP®, will represent the FPA PAC Board at FPA NexGen Gathering 2024 in Phoenix from August 20-22, where he will provide an FPA PAC update during lunch on August 21 at 12:30 p.m. (local time).



FPA PAC Board Members Shannon Pike, CFP®, Lance Eaton, CFP®, and Evelyn Zohlen, CFP®, will attend FPA Annual Conference 2024 in Columbus, OH, from September 18-20. The FPA PAC will have a reception at the event. Details will be coming soon!

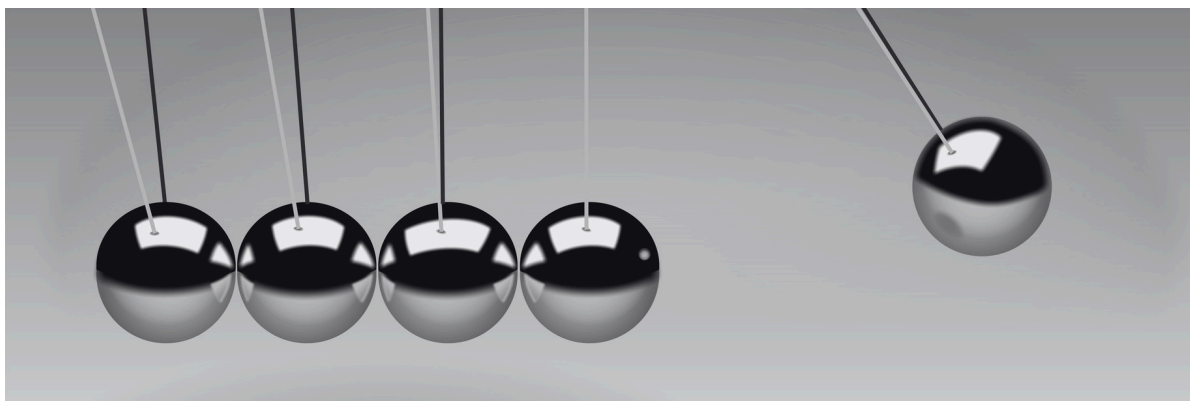


# FPA PAC ACTIVITY



In our Q1 2024 Update, FPA PAC Board Chair Skip Schweiss, CFP®, AIF®, highlighted that one of the FPA PAC's major goals this year is to "raise the level of awareness, engagement, and fundraising for the FPA PAC." To that end, the FPA PAC Board has been hard at work identifying key areas of improvement for engagement, awareness-building, and fundraising:

- Began identifying and implementing a third-party payment system that would allow members to sign up for recurring monthly donations on the FPA PAC website beginning in Q3.
- Continued to implement our 2024 communications strategy with brief FPA PAC updates in FPA SmartBrief, member email communications, the Chapter Leader Focus newsletter, among others.
- FPA PAC Board Member Shannon Pike, CFP®, represented the FPA PAC at FPA Retreat 2024 in Tucson and delivered remarks from the main stage.
- The FPA PAC continued to engage the FPA Public Policy Committee to ensure both bodies were coordinated on FPA PAC public policy advocacy activities.
- UPCOMING EVENT! The FPA PAC is excited to announce that Duane Thompson will join us for our November Virtual FPA PAC Event to lead a post-election discussion about how election results may impact financial planners and our advocacy efforts in 2025 and beyond. Stand by for the date and other details!



# POLICY UPDATES

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In June, FPA's executive volunteer leadership conducted a "Virtual DC Advocacy Week," which included six meetings with staff serving the Senate Finance Committee, the Senate Health, Education, Labor, and Pension Committee, the House Education and the Workforce Committee, and the House Committee on Financial Services. FPA leaders advocated in support of various financial literacy measures and the Freedom to Invest in Tomorrow's Workforce Act, and expressed FPA's opposition to the use of the Congressional Review Act and various Joint Resolutions of Disapproval in the House and Senate regarding the Department of Labor's Retirement Security Rule (DOL Rule).

To learn more about the current challenges to the DOL Rule, check out the first-ever Advocacy Updates column\* in the August issue of the *Journal of Financial Planning*.

*\*Note that since the article was written, and at the time of writing this FPA PAC Debrief, a Federal judge has issued a preliminary injunction, which temporarily blocks implementation of the DOL Rule until the Federation of Americans for Consumer Choice et al. v. U.S. Department of Labor, et al. is decided on the merits. The House has also passed out of the Committee on Education and the Workforce H.J. Res. 142, which would nullify the final DOL Rule, as it relates to the "Definition of an Investment Advice Fiduciary" section (there are separate resolutions for the amended PTEs, which have not been heard in Committee).*





# BY THE NUMBERS

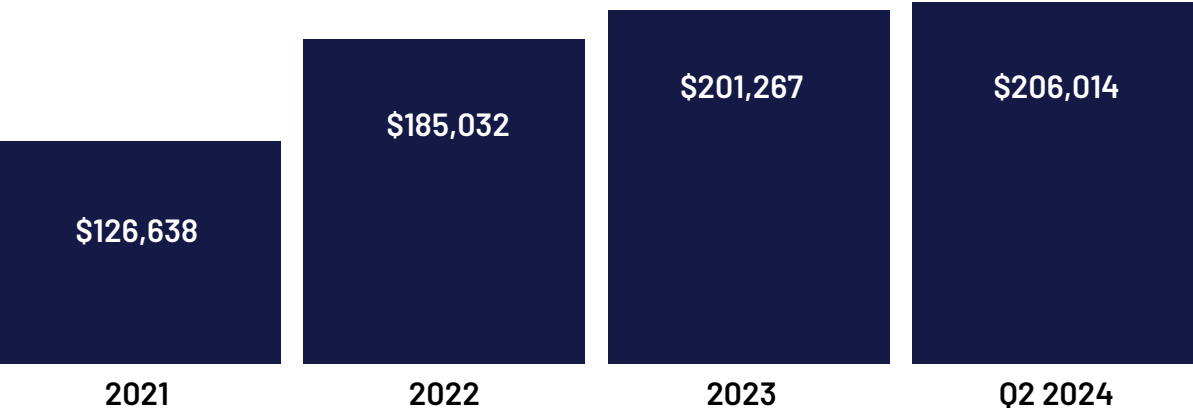
In Q2 2024, the FPA PAC received \$3,629 in donations, bringing year-to-date donations up to \$14,024. Thank you to the following FPA PAC donors!

Thank  
you!

Christopher Boyd, CFP®	Michael Branham, CFP®*
Barbara Bytell, CFP®	Maria Guhit, CFP®
James Lee, CFP®**	Rory O'Hara, CFP®
Michael Parker	Celese Revelli, CFP®
Ross Richardson, CFP®	Daniel Yerger, CFP®*

\*YTD Beltway Donor (\$500 - \$1,000)  
\*\*YTD Independence Donor (\$1,001 - \$2,500)

## FPA PAC BANK BALANCE (AS OF Q2 2024)





# SUPPORT YOUR PAC!

As the only federally-registered political action committee with a focus on financial planners, the FPA Political Action Committee (FPA PAC) is a force in elevating the profession.

To impact policies and legislation that affect the profession, the FPA PAC provides FPA and the financial planning community with a critical voice on important discussions, allowing us to forge relationships with lawmakers and to tell the financial planning story on a visible and impactful stage.

DONATE  
TODAY!

