

 FPAFINANCIAL  
PLANNING  
ASSOCIATION

# Take 5

October 2024

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



## Join Us in Chicago for FPA Retreat 2025!

We are excited to announce that [FPA Retreat 2025](#) is scheduled to take place at the Hilton Chicago Oak Brook Resort and Conference Center from April 28-30, 2025. This beautiful 150-acre estate features the Audubon-certified 18-hole Willow Crest Golf Club. The resort offers a lakefront outdoor pool, tennis, basketball, and volleyball courts, a spa, two golf simulators, and various restaurants. [Registration is now open](#) with special early bird pricing, so make plans to join us in Chicago next April!



## Unlock Magical Savings for FPA NexGen Gathering 2025!

If you were unable to attend FPA NexGen Gathering in August, you missed out on an incredible event! Make sure to mark your calendars for [FPA NexGen Gathering 2025](#), which will take place at the Hilton Orlando Lake Buena Vista from August 26-28, 2025. This fantastic property is an Official Walt Disney World Hotel, and attendees will get to enjoy exclusive Disney benefits, including direct access to Disney Springs. Early bird registration for FPA NexGen Gathering is now open, offering significant savings, so [be sure to register now!](#)

## Share Your Expertise in the 2025 Trends in Retirement Survey!

Conducted by the *Journal of Financial Planning* and sponsored by Finance of America, this survey will shed light on the future of retirement planning. Participate today to highlight the most important strategies and products, uncover insights into client readiness, and explore new trends. Your input will help shape how financial planners approach retirement planning in 2025 and beyond. It takes just eight minutes, so participate by October 31. [Take the survey now!](#)

## The October *Journal of Financial Planning* Is Now Available

FPA Members can now read the October 2024 issue of the *Journal of Financial Planning* to learn about tax-efficient ways to diversify stock positions, serving business owner clients, preparing for expiring TCJA tax cuts, cross-generational communication, strategic marketing, business continuity, data-driven insights into expanding your practice, and much more. Access the latest issue of the [Journal now.](#)

## New Research: Financial Planner Perspectives on a Profession In Transition

Discover how financial planners are navigating the rapidly changing landscape of our profession with the latest research from FPA and Allianz Life Insurance Company of North America. This comprehensive report reveals key trends, including a shift toward more client-centered approaches and adapting business models to meet client evolving needs. Whether you're looking to strengthen client relationships or explore new strategies for growth, this report offers valuable insights to help you stay ahead. [Download the full report now](#) and prepare for the future of financial planning.

## Daniel J. Galli, CFP®, Elected the 2025 President-elect of FPA

FPA announced that the Board of Directors elected Daniel J. Galli, CFP®, as the 2025 FPA President-elect for a one-year term. A passionate volunteer in the financial planning profession, Galli is the founder of Daniel J. Galli & Associates in Norwell, Mass., and is completing a three-year term on the FPA Board of Directors. Learn more about Galli and the new members of the board who will take office effective January 1, 2025. [Read the release.](#)

## Read the CEO Quarterly Update To Learn About FPA's Activities in Q3 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 Q3 of 2024. In the latest Update, Patrick highlights the upcoming 25th anniversary of the Association and provides details on some recent announcements. [Read the CEO Update now.](#)

## Podcast Alert! Subscribe to "The Blueprint: An FPA NexGen® Podcast"

Dive into the world of financial planning with "The Blueprint: An FPA NexGen® Podcast," where hosts Deshawn Peterson, CFP®, and Mike Zarrelli, CFP®, EA, navigate you through the lives of the next generation of financial planners. Join us as we uncover the personal journeys, triumphs, and challenges of emerging professionals in financial planning. Whether you're just starting out, a career changer, or a seasoned planner, find inspiration and valuable insights in this podcast. [Listen and subscribe today!](#)



**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!](#)**

