



FINANCIAL
PLANNING
ASSOCIATION

Take 5

November 2024

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



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!](#)

FPA Member Exclusive: 20% Discount on Absolute Engagement Engine!

We are thrilled to announce our partnership with Julie Littlechild and Absolute Engagement, offering FPA members an exclusive 20% discount on the Absolute Engagement Engine. This powerful tool combines technology with a structured process to enhance client and prospect engagement, drive growth, and uncover referral opportunities. Take advantage of this opportunity to elevate your practice and deepen client relationships with the Absolute Engagement Engine. [Get started!](#)

The November Journal of Financial Planning Is Now Available

FPA Members can now read the November 2024 issue of the *Journal of Financial Planning* to learn about gender lens investing, the three branches of delegation, understanding military benefits, diversity and succession in financial planning, contingent buy-sell arrangements, cultivating positive and productive conversations, the state of women in financial services, and much more. Access the latest issue of the [Journal now.](#)



Parsing the November 5th Election: Impact on the Financial Planning Profession

Veteran lobbyist Duane Thompson will provide FPA PAC supporters with a preview of what the November 5th election will mean for the profession. Will planners see a “rubber band effect” if Republicans take control and push for de-regulation? What will happen to the Tax Cuts and Jobs Act provisions set to expire next year? With the presidential contest too close to call, some of the issues to be covered are not ‘What If’ scenarios but more of the ‘What and when’ actions in the wake of what may be the Mother of all Cliffhanger Elections. Join the FPA PAC for this live, virtual event on Thursday, Nov. 21, at 4:00 p.m. ET. [Register now.](#)

Comment Letter on Expiring Provisions of the Tax Cuts and Jobs Act of 2017

FPA and allied organizations submitted a comment letter asking Congress to adopt tax incentives to encourage savers to seek advice and guidance from financial professionals. [Read the letter.](#)

Checkout FPA of New England’s “Wicked Pissah Podcast”

The Wicked Pissah Podcast, brought to you by the FPA of New England, features discussions for financial professionals, including topics on financial planning, recent or future events in the financial services industry, and interactions with influential people from across the profession. As a financial professional, this podcast, which has over 200 engaging episodes, is a show you will want to take advantage of. [Tune in!](#)

Engaging Conversations with Industry Thought Leaders on FPA LIVE!

Tune in to [FPA LIVE](#)—a fun series of conversations with interesting people doing interesting things in and out of financial planning. Each conversation is held live over FPA’s social media channels and available to you – on-demand – through the FPA Business Hub. We’re chatting with industry thought leaders, top practitioners, organizational leaders, well-known speakers, and many others to discuss topics and issues relevant to you as a financial planner. [Check out FPA LIVE today and stand by for more great content coming soon in the weeks and months ahead!](#)



**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.

