



# Take 5

April 2025

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



## Cybersecurity for Financial Planners: An FPA Certificate Program

In today's landscape, cybersecurity isn't optional—it's essential. FPA, FCI, and Buckler have partnered to create [Cybersecurity for Financial Planners: An FPA Certificate Program](#), equipping financial professionals with the critical knowledge and tools to protect their firms from cyber threats and meet complex regulatory requirements. Through six concise, high-impact modules, participants gain 3.5 CFP® CE credits while mastering key cybersecurity principles, regulatory alignment strategies, and best practices for building a resilient cyber program. Whether you're a seasoned security officer or newly responsible for cybersecurity, this course provides a clear, actionable roadmap to safeguard your firm, optimize resources, and stay ahead of evolving threats. [Enroll today to strengthen your cybersecurity and ensure compliance with confidence.](#)

## 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.](#)

## Read the CEO Quarterly Update To Learn About FPA's Activities in Q1 of 2025

To keep FPA Members and volunteer leaders apprised of what the Association is doing to support members and elevate the profession, FPA Interim CEO Dennis Moore, CFP®, provided a quarterly CEO Update for Q1 of 2025. In the latest Update, Dennis reflects on Patrick Mahoney's legacy, what the Association is doing today to advance its strategic plan, and the latest on member benefits. [Read the CEO Update now.](#)



## Access the April 2025 Issue of the Journal of Financial Planning!

FPA Members can now access the April 2025 issue of the *Journal of Financial Planning* to learn about inclusive leadership theory, how planners view the transformative impact of financial planning, serving women clients, sustaining real withdrawals, bridging the adviser-academic gap, and much more. Access the latest issue of the [Journal now.](#)

## Drive Business Growth with the Absolute Engagement Engine

Engaging with leads, differentiating the prospect experience, driving deeper conversations, measuring the quality of relationships, and uncovering and responding to referral opportunities. Each function is critical to driving new business growth in your practice, but each takes time and effort. Luckily, the [Absolute Engagement Engine](#) allows you to do all of this and more through a single platform that marries technology with a structured process to uncover and respond to what prospects and clients care about most. The best part is that FPA members can enjoy an exclusive 20% discount on this terrific platform! [Learn more and get started today!](#)

## Unlock Valuable Client Insights with FPA and Dimensional

Take your practice to the next level with the [Global Client Experience Study](#), exclusively available to FPA members and powered by Dimensional. This customizable tool helps you understand what your clients value most, measure their satisfaction, and assess their willingness to refer your services—all at no cost. Participating lets you gain actionable insights to enhance client relationships, improve efficiency, and identify new growth opportunities. [Don't miss out—register by April 28 to start transforming your client experience!](#)

## Fulfill Your IAR CE Obligation with Kitces IAR Ethics CE Day on August 28

Kitces IAR Ethics CE Day is the ultimate solution for Investment Adviser Representatives (IARs) to fulfill their CE obligations. Join us on Thursday, August 28, for virtual sessions led by experts in ethics and regulation, earning your 6 hours of IAR Ethics CE while also gaining 6 hours of CE for CFP®, CIMA, CPA, and other designations. There are no vendors or sponsors—just pure, high-quality content. Plus, part of your registration will be sent to your local FPA chapter to support other programs that support YOU. Don't miss out! Register today for \$247 (general admission) or \$197 (Kitces Premier members). [Register now!](#)



**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!](#)**

