



FINANCIAL
PLANNING
ASSOCIATION

Take 5

May 2025

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



Las Vegas is Calling! Join Us at FPA Annual Conference 2025

Join your peers at one of the largest gatherings of financial planners—[FPA Annual Conference 2025](#), taking place November 3-5 in Las Vegas! This is where the profession comes together to connect, collaborate, and shape what's next. With engaging sessions, powerful keynotes, and opportunities to learn from planners in the trenches, you'll leave with fresh ideas and practical tools to elevate your work. Register by July 28 to take advantage of early bird pricing and be part of THE event for the financial planning community. [Register today!](#)



FPA NexGen Gathering 2025: Orlando Awaits

Are you ready to connect, grow, and be inspired? Don't miss [FPA NexGen Gathering 2025](#), happening August 26-28 at the Hilton Orlando Lake Buena Vista! This one-of-a-kind event is designed by and for the next generation of financial planners—offering meaningful conversations, career-shaping connections, and an inclusive, supportive community. Register by May 23 to take advantage of early bird pricing and secure your spot at the best rate. [Learn more and sign up today!](#)

DEI Scholarship Application Open for FPA Annual Conference 2025

FPA is now accepting applications for the FPA Diversity Scholarship to attend FPA Annual Conference 2025 in Las Vegas! This merit-based scholarship is awarded to financial services students and professionals who demonstrate and act upon an intense desire to promote diversity in the financial planning profession. Submissions are due May 30, so act fast! [Apply today!](#)



Access the May 2025 Issue of the *Journal of Financial Planning*!

FPA Members can now access the May 2025 issue of the *Journal of Financial Planning* to learn about the compliance risks of generative AI, client motivation, the link between technology and succession planning, leveraging AI to scale personalization, understanding political sympathy's association with financial perspectives, and much more. Access the latest issue of the [Journal now.](#)



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Application Due June 4 for the 2026 FPA Board of Directors

Are you ready to take your leadership to the next level? FPA is seeking exceptional individuals like you to join our esteemed Board of Directors. As a member of the FPA Board of Directors, you'll have the unique opportunity to shape the future of financial planning and make a lasting impact on the profession. Your vision, insights, and strategic contributions will help drive the direction of FPA and influence key decisions that shape the profession. You'll have a platform to voice your ideas, drive innovation, and contribute to the growth and success of FPA and our Members. [Applications due June 4!](#)

Now Available: The 2025 Trends in Retirement Planning Survey Report

Unlock the secrets to successful retirement planning with the insights from the 2025 Trends in Retirement Planning survey report! This invaluable resource, based on research by FPA, the Journal of Financial Planning, and Finance of America, is for financial professionals eager to elevate their retirement planning strategies and support their retiree and pre-retiree clients. Don't miss out on the opportunity to stay ahead in the ever-evolving landscape of retirement planning. [Get your copy today!](#)

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.](#)



**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!](#)

