FPA FINANCIAL PLANNING ASSOCIATION
25 YEARS

Take 5

June 2025

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

Join Us at FPA Annual Conference 2025 in Las Vegas!

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 connects, collaborates, and shapes 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 premier event for the financial planning community. Register today!

FPA NexGen Gathering 2025: Registration is Still Open!

Don't miss FPA NexGen Gathering 2025, 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 now to secure the best registration rate.

Join FPA Leaders for the 'State of FPA' Update for Membership on June 25

Would you like to get updated about the latest FPA initiatives and programs? On Wednesday, June 25, at 4 p.m. ET (1 p.m. PT), FPA will host a "State of FPA" Update for Membership, where you will get a look at the work that FPA has been doing to drive value for you. Additionally, the 2024 FPA Annual Report will be revealed during the session. This is a fantastic opportunity to stay up-to-date on your membership Association. Register today.

2025 Trends in Investing Report: Planners Turn to Alternative Investments

In response to market uncertainty, financial planners are increasingly embracing alternative investments, as highlighted in the 2025 Trends in Investing Survey by the *Journal of Financial Planning* and FPA. With insights from 195 planners, this report offers insights into today's evolving investment landscape. Read the full report!

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

FPA Members can now access the June 2025 issue of the *Journal of Financial Planning* to learn about surviving a bear market, an insurance crisis, marketing, building a personal brand, unlocking the power of generative AI, estate planning for unmarried partners, the impact of tariffs on digital assets, inherited RMDs, strengthening the adviser-academic connection, and much more. Access the latest issue of the *Journal* now.

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The Psychology of Financial Planning Specialist™ Program

FPA is proud to renew its partnership with the Psychology of Financial Planning Specialist™ program to equip financial planners with essential skills that deepen client relationships and enhance their practices. Developed by renowned experts Dr. Brad Klontz, CFP®, and Dr. Charles Chaffin, this 9-hour program, which also qualifies for nine CFP(R) CE credits, provides financial planners with a structured approach to understanding client behaviors, money beliefs, and communication strategies. Learn more and enroll in this terrific on-demand program!

Live Webinar: Dana Anspach Talks Home Equity

With seniors today controlling over $14 trillion in home equity and needing to plan for a retirement of 20 years or longer, incorporating home equity into the planning process could enhance retirement outcomes. Join us on June 25 at 2:00 p.m. ET when Dana Anspach, CFP®, of Sensible Money, LLC, leads a session exploring the different options for using home equity, how home equity can address planning shortfalls and bring cash flow and income tax efficiencies to a retirement plan, and lead to other generational and wealth transfer opportunities. This session is sponsored by Finance of America. Register today.

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!