



Take 5

January 2026

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



Don't Miss David Booth at FPA SHIFT™ 2026!

Struggling to explain market uncertainty in a way that clients understand and trust? At [FPA SHIFT™ 2026](#), April 20–22 at the stunning La Jolla Torrey Pines, legendary investor and Dimensional Fund Advisors Founder David Booth will show you how to transform your investment conversations so they resonate on a human level. In this keynote conversation, *Life, Invested™*, you'll learn how to use real-life experiences to help clients feel calmer, more confident, and more aligned with their goals. You'll walk away with practical language you can use immediately to deepen relationships and build trust. [Register before the advanced deadline and give yourself a competitive edge.](#)

Explore AI with the FPAi Authority: Your Hub for Cutting-Edge AI Guidance

Whether you're already experimenting with AI or have no idea where to start, FPA's new [FPAi Authority](#) gives you practical tools and expert guidance to help you work smarter, save time, and serve clients better. Built with Matt Reiner, CFP®, CFA, of Capital Investment Advisors and The FutureProof Advisor, FPAi Authority provides you with a curated hub of videos, demos, blog posts, and trend updates, so you don't have to sort through the noise. You can already explore AI demos and peruse exclusive content, but stay tuned. New content will be added regularly to keep you on the cutting edge of this revolutionary technology. [Get started!](#)

Access the January 2026 Issue of the *Journal of Financial Planning*!

FPA Members can now access the January 2026 issue of the *Journal of Financial Planning* to learn about education funding, career pathways in financial planning, the intersection of college and estate planning, risk tolerance and portfolio choice, and much more. Access the latest issue of the [Journal now.](#)



FPA Competency Model

Learn how it can help you master core behavioral skills and achieve greater professional growth!

START NOW



The FPA®
Competency
Model™

FPA LIVE: Reflections and Road Ahead with FPA's Leadership Team

In this [FPA LIVE conversation](#), we sit down with 2025 FPA President Paul Brahim, CFP®, President-elect Dan Galli, CFP®, and CEO Dennis Moore, CFP®, to reflect on a pivotal year for the Financial Planning Association and the profession. From milestone celebrations and strategic initiatives to evolving member needs and bold new directions, this conversation explores the moments that defined 2025 and what lies ahead in 2026. Tune in for a candid, forward-looking discussion about where we've been, what we've learned, and how FPA is positioning itself to be an even stronger partner in planning. Thank you to the American Heart Association Professional Advisor Network for sponsoring this episode. Visit heart.org/FPA to join today.

Leadership in Financial Planning: Building Trust, Teams, and the Future

True leadership in financial planning isn't about titles—it's about behaviors. In the fifth article of the FPA® Competency Model™ series, Nicholas Nicolette, CFP®, and Kimberly Bridges, Ph.D., CFP®, share how leaders can build diverse teams, mentor the next generation, and create authentic, values-based firms that strengthen both their organizations and the profession. They explore how the Competency Model helps planners cultivate empathy, elevate their personal brand, and prepare the profession for the future. [Read the article to see how today's actions shape tomorrow's legacy.](#)

LIVE WORKSHOP: The Power of the Moment—A Client Experience Workshop

Client events aren't about logistics, they're about moments that build trust. The Power of the Moment is a fast-paced, interactive workshop that shows planners how to design ROM – Return on the Moment™ client experiences that deepen loyalty and spark natural referrals. Join Elyse Stoner and Angela York of Event Advisors on February 12 at 12:00 p.m. ET when you'll learn the core principles behind effective, strategic event moments, map your own business goals to meaningful client experiences, and collaborate with peers to generate fresh, usable event ideas. [Register now!](#)

FPA MediaSource: Nearly 10,000 Journalist Queries and Counting

FPA MediaSource is connecting financial planners with journalists at an unprecedented scale. Since its launch, the system has sent nearly 10,000 media queries to participating members, and now it's even easier to get involved. With a fresh design, streamlined navigation, and a complete history of your responses, FPA MediaSource helps you secure valuable media coverage, create content, and stay compliant. [Discover how to share your expertise with the media today!](#)

FPA Member Savings on Snappy Kraken's Award-Winning Marketing Platform

Elevate your firm's growth with Snappy Kraken, the award-winning marketing automation platform built specifically for financial advisers. As an FPA member, you can take advantage of an exclusive 15% discount on solutions designed to help you attract leads and deepen client relationships with ease. Select from solutions that will help you attract, nurture, and retain clients through powerful, compliant marketing automation. You can reach more prospects, stay top-of-mind, and deepen client relationships—all while spending less time managing marketing tasks. [Get this special offer today!](#)