



# Take 5

April 2026

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



## FPA GATHER 2026: Your People Are in Dallas This August

Early in your career, it's easy to feel like you're figuring it out alone. [FPA GATHER 2026](#) is the antidote to that. August 18–20 in Dallas, this is three days built entirely around you—early-career planners and career changers who are serious about the profession and hungry to connect with others who get it. No awkward networking. No sitting in the back of the room wondering if you belong. Just real conversations, real relationships, and the kind of community that sticks around long after you've unpacked your bag. It used to be called FPA NexGen Gathering. The name is new. The energy isn't. [Register now and lock in the lowest rate available. Early bird pricing won't last.](#)

## FPA Residency: You've Got the Knowledge. Now Get the Experience.

There's a big difference between knowing financial planning and actually doing it. [FPA Spring Residency 2026](#) is where that gap closes. From June 12–17 in Aurora, Colorado, you'll spend six days fully immersed in the real work of the profession—working through cases, making decisions under pressure, getting honest feedback from mentors, and learning alongside peers who are right where you are. You'll walk away with 28 CFP® CE credits or three months of CFP Board experience toward your certification. More importantly, you'll walk away ready. Spots are limited.

[Register today.](#)

## Access the April 2026 Issue of the *Journal of Financial Planning*!

FPA Members can now access the April 2026 issue of the *Journal of Financial Planning* to learn about ethics challenges in the age of AI, building referrals, ethical pitfalls when working with clients and lawyers, widowhood and limits on advisory models, how cultural dimensions shape client financial goals and behaviors, 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™



## LIVE WEBINAR: Rethinking Long-Term Care—The Strategic Role of Home Equity

Long-term care is one of retirement's most underplanned risks, often reduced to a single insurance decision despite the unpredictable way care needs unfold. Many clients, however, hold substantial home equity that could be incorporated into planning. Join us on April 29 at 2:00 p.m. ET when Finance of America shows you how reverse mortgages can work alongside traditional funding methods to help manage cash flow for care and make it easier for people to stay in their homes. [Register now.](#)

## FPA Marketplace: You're Leaving Money on the Table

Your FPA membership comes with more than you think. The FPA Marketplace, powered by the Chalice Network®, gives you exclusive discounts on insurance, fintech tools, and everyday brands you already use: Verizon, Costco, Geico, Avis, Disney, and more. It takes two minutes to explore and costs you nothing. [Check out the FPA Marketplace today.](#)

## FPAi Authority: From Chatbots to Coworkers—AI's Next Leap

Stop by the [FPAi Authority](#) to check out the latest "FI in Finance" video series, where Matt Reiner of Capital Investment Advisors explores the economic undercurrents of AI adoption—and the signals that matter most for advisory firms preparing for a decade of transformation. From Anthropic's new economic index to the rise of local agents like Clawdbot and Claude Cowork, this episode focuses on what's changing beneath the surface: how people are using AI, what those behaviors reveal about the future of work, and why advisory firms need to think beyond "tools" and start thinking about systems. [Check it out.](#)

## FPA LIVE: Connecting Consumers to the Power of Financial Planning

In this [FPA LIVE conversation](#), we sit down with Dennis Moore, CFP®, CEO of the Financial Planning Association, and Robert Sofia, CEO of Snappy Kraken, to unveil an exciting new strategic partnership designed to transform one of FPA's most visible public-facing programs: FPA PlannerSearch. They share how this redevelopment will go far beyond a directory refresh, turning FPA PlannerSearch into a dynamic engine that elevates public awareness of the value of financial planning while creating a powerful, modern lead-generation platform for FPA members. We explore the vision behind the collaboration, how marketing technology and strategy will fuel this evolution, and what members can expect as FPA PlannerSearch becomes a more robust tool for visibility and growth. This episode of FPA LIVE is brought to you by Zocks, the AI Assistant for financial advisors that saves you 10+ hours every week. Start your free trial at [www.zocks.io](http://www.zocks.io).

## FPA MediaSource: More Than 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 more than 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!](#)