



FINANCIAL
PLANNING
ASSOCIATION

Take 5

August 2025

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



Live Taping of The Compound & Friends to Close FPA Annual Conference 2025

Get ready to close out [FPA Annual Conference 2025](#) with energy, information, and a few laughs as The Compound & Friends takes the main stage for a special live taping! Join Downtown Josh Brown, Michael Batnick, and friends for their signature mix of sharp market analysis, candid commentary, and hot takes on the latest in business and investing. With their unique ability to cut through the noise and make sense of what's really happening in the economy and markets, The Compound & Friends will leave you informed, entertained, and ready for what's next. Don't miss this exciting—and fun!—finale to an unforgettable conference in Las Vegas! [Register to take advantage of special advanced registration pricing!](#)

Essential Behavioral Skills for Financial Planners: The FPA® Competency Model™

Financial planning is a relationship business, and the difference between a good planner and a great one often comes down to how well they communicate and connect. In the first article of a new series, you'll explore why the FPA Competency Model is essential for building critical behavioral skills, including critical thinking, communication, professionalism, and leadership. These deeply human competencies are what elevate technical expertise into true professional impact. [Discover how the FPA Competency Model can support your growth at every career stage, and why now is the time to start.](#)



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

FPA Members can now access the August 2025 issue of the *Journal of Financial Planning* to learn about building visibility in a crowded marketplace, Medicaid crisis planning, confidence-building for younger planners, marketing your succession plan to attract and retain clients, personality traits and annuity adoption, and much more. Access the latest issue of the [Journal now.](#)

**FPA ANNUAL
CONFERENCE 2025**

November 3-5, 2025 | MGM Grand Las Vegas

60+

Influential
Speakers

70+

Incredible
Partners

75+

Insightful
Sessions

REGISTER NOW



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Elder Planning Specialist Program: Next Cohort Starts September 15

FPA and Plan4Life, LLC, are partnering to bring the next cohort of the [Elder Planning Specialist Program](#) to FPA members! This 12-week online program is designed to prepare serious financial planners to meet the needs of their older clients. Delivered in a cohort format, the program utilizes experts in several important fields to present meaningful video programs that cover such areas as legal planning, long-term care planning, end-of-life planning, and running a family meeting. The program qualifies for 10 CFP® CE credits and is available to FPA members for \$1,195 and nonmembers for \$1,495. Participants receive a certificate of completion showing their specialized elder planning training. [The next cohort begins September 15, so register soon!](#)

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!](#)

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!](#)

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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.

DONATE TODAY!

