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December 2025

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

Registration for FPA SHIFT™ 2026 Is Open!

FPA SHIFT™ 2026 (formerly FPA Retreat) is where financial planners step away to transform. It's where personal and professional evolution occurs, and your "shift" begins. Taking place April 20-22 at the Hilton La Jolla Torrey Pines, FPA SHIFT™ 2026 is ideal for financial planners at all career stages who want space to think differently about their work and connect with peers reimagining what financial planning can be. Learn more and register today with an early bird rate!

FPA Unveils Reimagined Conference Lineup

FPA announced that its four annual national conferences are being reengineered and rebranded to be more impactful and relevant in a crowded financial services conference landscape. FPA will tailor its events to reflect each financial planner's unique journey, from their early beginnings through growth, transformation, and leadership. Having been a trusted resource since many planners' early career days, the Association is focused on ensuring each conference, beginning in 2026, offers targeted, meaningful experiences aligned with their evolving professional paths. Read the release.

Crystal Alford-Cooper, CFP®, Elected FPA's 2026 President-elect

FPA announced that the Board of Directors elected D. Crystal Alford-Cooper, CFP®, as the 2026 FPA President-elect for a one-year term. Alford-Cooper's term will begin Jan. 1, 2026, succeeding incoming 2026 FPA President Daniel Galli, CFP®. Alford-Cooper brings her lifelong passion for financial wellness to the role; she is the director of financial planning at Law & Associates Wealth Management and Planning in Glen Echo, Maryland. Learn more about Crystal and the newly elected Board members.

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

FPA Members can now access the December 2025 issue of the *Journal of Financial Planning* to learn about the charitable giving efficient frontier in the OBBA era, the missing metric in charitable giving, navigating market volatility with structured notes, financial planning for women, bitcoin, technology, Social Security claiming decisions for married couples, and much more. Access the latest issue of the *Journal* now.

FPA FINANCIAL PLANNING ASSOCIATION 25 YEARS

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FPA LIVE: The Present and Future of Financial Planning Education

In this FPA LIVE conversation, we're joined by three nationally recognized leaders in financial planning education: Dr. Megan McCoy (Kansas State University), Dr. Sonya Lutter (Texas Tech University), and Dr. Craig Lemoine (University of Illinois Urbana-Champaign). We explore how financial planning programs at the undergraduate and graduate levels are evolving to meet the needs of both students and the profession. We also discuss the surge in student interest, innovative curriculum changes, how programs are preparing the next generation of planners, and the increasing relevance of graduate education for experienced professionals looking to deepen their expertise. 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.

FPA's Quarter Century of Leadership and Legacy

For 25 years, FPA has been dedicated to elevating the financial planning profession and empowering planners at every stage of their journey. Our anniversary video showcases the voices, stories, and achievements that set the stage for the next era of financial planning. Take a moment to celebrate this milestone and the members who made FPA possible—and who will help shape its future. Watch the video!

Subscribe to "The Blueprint: An FPA NexGen® Podcast"

Dive into the world of financial planning with "The Blueprint: An FPA NexGen® Podcast," where hosts Deshawn Peterson, CFP®, and Mike Zarrelli, CFP®, navigate you through the lives of the next generation of financial planners. Join them as they uncover the personal journeys, triumphs, and challenges of emerging professionals in financial planning. Whether you're just starting, a career changer, or a seasoned planner, find inspiration and valuable ideas in this podcast. Listen and subscribe today!

What are Financial Pros Like You Using In Their Tech Stack? Let's Find Out.

Bob Veres and Joel Bruckenstein are conducting their 2026 T3/Inside Information Software Survey, where financial professionals rate the software products and services they use. The survey typically takes 15-20 minutes to complete and was designed to make it easy for you to select and rate each part of your software suite with a single click. You'll also see new categories (like AI note-takers) and new solutions that aren't well-known (yet). Once the data is compiled, the full report will be available to FPA members at no cost and will offer the most comprehensive user rating and market penetration data available anywhere. Take the survey today!