



Take 5

July 2025

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



FPA Annual Conference 2025: Where Financial Planning Takes Center Stage

Get ready to celebrate FPA's 25th Anniversary in style at the [FPA Annual Conference 2025](#), taking place November 3–5 at the iconic MGM Grand in Las Vegas! Join the largest gathering of CFP® professionals for three action-packed days of inspiring keynotes, cutting-edge education, and unparalleled community building, including at least 10 hours of CFP® CE credit. Plus, with Las Vegas as your backdrop, you'll balance business with energy and fun in one unforgettable experience. [Register now and secure your early-bird rate before July 28!](#)

Elevate Your Financial Planning Career: Introducing the FPA® Competency Model™

As part of FPA's 25th anniversary celebration, we're proud to introduce the [FPA® Competency Model™](#)—a groundbreaking framework designed to elevate the behavioral and interpersonal skills that define excellence in financial planning. Developed through years of collaboration with practitioners, academics, and experts, this model goes beyond technical knowledge to help you grow in six essential domains, including communication, leadership, professionalism, and critical thinking. Available now through the FPA Learning Center, the model features a self-guided assessment, detailed competency breakdowns, and curated educational resources tailored to your career stage—empowering you to lead with purpose and advance both your career and the profession. [Get started!](#)

Quarterly FPA CEO Update: An Update on Your Membership Association

FPA Chief Operating Officer and Interim CEO Dennis Moore, CFP®, provides a second-quarter recap of the work the Association has been doing to support members and the profession. He highlights FPA's 25th anniversary, the launch of the FPA Competency Model, and much more. [Read the update now.](#)



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

FPA Members can now access the July 2025 issue of the *Journal of Financial Planning* to learn about navigating Affordable Care Act changes, QLACs, supporting clients through good and bad, what to expect from digital marketing, the risks planners should be pricing into client portfolios, mapping the language of retirement, 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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The 2024 FPA Annual Report is Now Available

Over the past year, FPA leaders and staff have continued to work hard as your partners in planning, delivering value through Practice Support, Learning, Advocacy, and Networking. The newly released 2024 FPA Annual Report highlights these efforts and the many programs, services, and events that are enhancing your member experience. It also includes key membership insights and the 2024 audited financials. [Read the 2024 FPA Annual Report now.](#)

Commit to the '25 in 2025' Financial Wellness Pledge to Transform Lives

FPA is turning 25, and we're celebrating by giving back! Join the '25 in 2025' Financial Wellness Pledge and dedicate 25 hours this year to provide free financial planning and education to individuals and families who need it most. Start your journey today—opportunities await through your local chapter, national programs, or online resources. Let's make 2025 a year of purpose and impact! [Take the pledge now!](#)

The Coverage You Need: FPA Insurance Programs

As your partner in planning, FPA wants to help you protect your business and employees through various insurance programs exclusively offered to our valued members. From Group Medical Plans and Disability Insurance to Business Overhead Expense Insurance and Cyber Liability and Data Breach Insurance, FPA and our partners at Ryan Insurance Strategy Consultants have you covered. [Get started!](#)

Tune In to FPA LIVE: They're Live and On-Demand!

Tune in to FPA LIVE, a fun series of conversations with interesting people doing interesting things in and out of financial planning. Each interview is held live over FPA's social media channels, and the entire library of conversations is available through the FPA Business Hub. Watch previous conversations with Daniel Pink, Matt Halloran, Julie Littlechild, Nicole Casperson, Cameron Logar, Kalli Fedusenko, Alexandra Armstrong, and many others. [Check out FPA LIVE 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!](#)

