



Take 5

March 2026

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



Final Days to Register for FPA SHIFT[™] 2026

The March 16 registration deadline for [FPA SHIFT[™] 2026](#) is almost here. Don't miss this opportunity to step away from the noise and engage with peers, innovators, and industry leaders April 20-22 at the Hilton La Jolla Torrey Pines in La Jolla, California. With sessions covering AI-driven strategy, succession planning, and the evolving policy landscape, you'll gain insights to strengthen your practice and better serve clients. [Time is running out—register now before registration closes on March 16.](#)

FPA GATHER 2026: New Name, Same Amazing Experience

[FPA GATHER 2026](#), formerly FPA NexGen Gathering, brings the energy of connection to the next generation of financial planners. To be held in Dallas, TX, from August 18-20, this is where early-career planners and career changers come together to learn, share, and feel like they belong. From the moment you arrive, everything is designed to help you settle in, lean in, and start building relationships that last well beyond the event. [Register now and save with early bird pricing—the lowest possible registration available!](#)

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

FPA Members can now access the March 2026 issue of the *Journal of Financial Planning* to learn about building wealth for real estate investors, difficulties with goals-based financial planning, artificial intelligence, navigating succession traps, how your mode of communication affects understanding, closing the advice gap, 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 Spring Residency 2026: Registration Is Open!

Registration is now open for the [FPA Spring Residency 2026](#) program taking place June 12–17, at the Hyatt Regency Aurora-Denver Conference Center in Aurora, Colorado. This highly acclaimed, experiential learning program immerses new and soon-to-be CFP® professionals in the real-world practice of financial planning through case-based role-playing, individualized mentorship, and peer collaboration. Plus, you can earn 28 CFP® continuing education credits or three months of CFP Board experience toward your certification requirement. [Sign up today!](#)

Kitces Tax Intensive CE Day: Support Your Development—and Your FPA Chapter!

Join the Kitces Tax Intensive CE Day 2026, a focused virtual event on March 12, where you can earn all 6 hours of your IAR Products & Practice CE and enhance your tax strategy skills with expert instruction—no vendors, just practical education. Participate from anywhere with recorded access and enjoy automatic CE reporting. Register today, and part of your registration will go back to your FPA chapter to support local programming! [Sign up for \\$347 or \\$247 for Kitces Premier members.](#)

FPAi Authority: What AI Will Change in Wealth Management (And What Won't)

Matt Reiner of Capital Investment Advisors and The FutureProof Advisor, our partner in the [FPAi Authority](#), breaks from the usual three-headline format in his monthly AI in Finance video series to focus entirely on the year ahead. What will matter in wealth management as AI moves from novelty to infrastructure? Matt shares six predictions that outline the real forces shaping how wealth managers will work, compete, and deliver value in the next era of AI. [Check it out!](#)

FPA LIVE: Going Old School—Defining Yourself In the Age of AI

In [this episode of FPA LIVE](#), we're joined by Kristin Harad of Full Advisor Coaching, Kristen Luke of Kaleido Creative Studio, and Derek Pollard of Constellar Creative for a timely conversation about how financial planners can stand out in the age of AI. As artificial intelligence increasingly handles many of the technical and operational basics of advice, financial planners face a new question: how do you define yourself differently when technology can do so much? These marketing leaders explore how AI can help planners become more present and more human, why clarity of identity matters more than ever, and how the future of marketing may require a surprising return to "old school" in-person connection and authentic relationship-building. 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.

Contribute To Research from the *Journal of Financial Planning*!

Share your expert thoughts on the biggest influences on investing, from gen AI to ESG, to help shape the content of the June issue of the *Journal of Financial Planning*. Conducted since 2006, the annual Trends in Investing Survey takes no more than seven minutes to complete. The results of this highly-anticipated research will reveal industry-shaping trends affecting you and your clients. [Take the survey today.](#)