Take 5

November 2025

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

FPA Announces Dennis J. Moore, MBA, CFP®, as Chief Executive Officer

FPA was pleased to announce the appointment of Dennis J. Moore, MBA, CFP®, as its new chief executive officer (CEO). Moore has served as Chief Operating Officer and Interim CEO since February 2025 and has been a consistent presence within FPA at both the chapter and national levels over the past two decades. Read the announcement.

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.

How the FPA® Competency Model™ Empowers Mid-Career Planners

What does it take to thrive in the middle stages of a financial planning career? In the latest article in our Competency Model series, Hannah Moore, CFP®, CeFT, and Paul Brahim, CFP®, CEPA, explore how mid-career planners can strengthen leadership, critical thinking, and self-awareness to serve clients and teams better. Discover how the FPA Competency Model helps experienced professionals evolve from technical experts to trusted leaders who deliver deeper, more human-centered value. Read the article.

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

FPA Members can now access the November 2025 issue of the *Journal of Financial Planning* to learn about helping clients plan for their second act, multigenerational retention, compensation as a driver of motivation and culture, diversity in succession planning, goals-based insurance planning, supporting women's wealth journeys, financial business planning, financial wellness, and much more. Access the latest issue of the *Journal* now.

FPA LIVE: The Story Behind FPA of New England's "Wicked Pissah Podcast

In this FPA LIVE conversation, we sit down with Brad Wright, Kathleen Kenealy, and Michael Connaughton—hosts of the Wicked Pissah Podcast by FPA of New England—to uncover the behind-the-scenes story of how a local chapter podcast became a dynamic platform for community and conversation. You hear how these three full-time financial planners and volunteer leaders manage the podcast, keep it running amidst their many responsibilities, and why the experience has been both personally rewarding and professionally valuable. If you're part of an FPA chapter looking to engage your audience in new ways or a planner curious about starting your own show, this episode will get into the nitty-gritty of building something that sticks. Thank you to the American Heart Association Professional Advisor Network for sponsoring this episode. Visit heart.org/FPA to join today.

Discover the FPA Marketplace: Your Ultimate Hub for Exclusive Deals!

Ready to unlock incredible savings and perks? Dive into the FPA Marketplace, powered by the Chalice Network®, and unlock a world of tailored benefits just for you. Whether you're looking for unbeatable insurance rates, fintech discounts, or everyday savings, we've got you covered! Explore BenefitHub and save thousands on services and programs you love from companies like Verizon, Costco, Geico, Avis, Hertz, Disney, AMC, Gap, and more. These exclusive offers are all at your fingertips and packed with value! Don't wait—access the FPA Marketplace today and start saving.

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!

FINANCIAL PLANNING ASSOCIATION + Allianz

PARTNER SPOTLIGHT

ALLIANZ LIFE INSURANCE COMPANY OF NORTH AMERICA

At Allianz, we believe collaboration drives success. Through our partnership with FPA, we're making it easier for financial planners like you to access the education, solutions, and support you need to stay ahead in a changing industry and deliver lasting value to your clients.

As an FPA Member, you can take advantage of the following benefits today:

Education and insights:

Participate in specialized webinars and in-person sessions at FPA conferences designed to address today's planning challenges.

Innovative tools and resources:

Access cutting-edge fintech tools along with comprehensive advisory sales and practice management support to help streamline your business and seek to improve client outcomes.

Advisory solutions and support:

Leverage solutions built to perform across diverse market environments, plus market-leading consultation and value-add services that provide you with tailored support, when and how you need it.

Our collaboration is built around your priorities – giving you the guidance and flexibility you need to serve your clients your way.

Your practice. Your clients. Your choice.

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About Allianz Life Insurance Company of North America

Allianz Life Insurance Company of North America, (Allianz Life), one of the Ethisphere World's Most Ethical Companies®, has been trusted since 1896 to help millions of Americans prepare for financial uncertainties and retirement with a variety of innovative risk management solutions. In 2024, Allianz Life provided additional value to its policyholders via distributions of more than $18.6 billion. Allianz Life is a leading provider of fixed index annuities, registered index-linked annuities, and indexed universal life insurance. Additionally, Allianz Investment Management LLC (AllianzIM), a registered investment adviser and wholly owned subsidiary of Allianz Life, offers a suite of exchange-traded funds (ETFs). Allianz Life and AllianzIM are part of Allianz SE, a global leader in the financial services industry with more than 157,000 employees in nearly 70 countries. Allianz Life is a proud sponsor of Allianz Field® in St. Paul, Minnesota, home of Major League Soccer's Minnesota United.