



Take 5

October 2025

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



Don't Miss the Q3 2025 CEO Update: Your Voice, Your Profession, Your Power

From tracking 217 bills across 42 states to defending against professional services taxes and securing wins, such as the new 529-fund rule change, the latest CEO Update from Dennis Moore, MBA, CFP®, showcases how FPA is actively shaping policy for planners like you. Learn how your membership is amplifying influence in Washington, at the state level, and beyond, and how you can plug into the momentum. [Read the Q3 2025 CEO update now.](#)

Skills That Will Define Next Generation Planners: The FPA® Competency Model[™]

What will define the next generation of great financial planners? In the latest article in our Competency Model series, Jack Heintzelman, CFP®, shares how planners can grow their emotional intelligence, mentor others, and build authentic client relationships that go beyond the numbers. Learn how the FPA Competency Model[™] provides a roadmap for personal growth, business development, and long-term impact in a changing profession. [Read the article.](#)

New Member Benefit: Exclusive Savings on the Money & Risk Inventory[™] (MRI) Core

FPA is excited to offer members 10% off the innovative MRI Core, a breakthrough tool that uncovers the psychological and behavioral drivers behind client financial decisions. By integrating MRI Core into your practice, you can deepen client engagement, build stronger trust, and tailor recommendations that align with each client's true comfort with risk. Start transforming your client conversations and planning outcomes today. [Try it here](#), or contact Dr. Charles Chaffin at DrCharles@moneyandriskinventory.com for firm pricing.

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

FPA Members can now access the October 2025 issue of the *Journal of Financial Planning* to learn how OBBBA will impact business owners, the art of the exit, due diligence in private equity, digital marketing, motivating clients to act, estate planning flexibility under the OBBBA, the QBI deduction, navigating fiduciary duty in the era of ESG investing, 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 LIVE: Kristin Harad on Building Your Business Development Engine

In this [FPA LIVE conversation](#), we sit down with Kristin Harad, CFP®, Business Development Coach and Fractional CMO, for a preview of her session at FPA Annual Conference 2025. Kristin shares insights from her workshop Blueprint for Version 2.0: Build Out Your Business Development Engine to Drive Scalable Growth. Taking a firm-level view, we explore how firm leaders can move beyond referrals to design a business development ecosystem that integrates marketing, sales, and client experience into a single growth engine. Find out why business development can feel so difficult for financial planners, how leaders can shape a successful business development environment, and where you may uncover hidden revenue opportunities. Thank you to the American Heart Association Professional Advisor Network for sponsoring this episode. Visit heart.org/FPA to join today.

FPA to Recognize LeCount R. Davis, MCS, CFP®, with the P. Kemp Fain, Jr., Award

FPA was pleased to announce LeCount R. Davis, MCS, CFP®, as the recipient of the Association's and profession's highest individual award – the 2025 P. Kemp Fain, Jr., Award. This pinnacle of recognition is bestowed on an individual who has made significant contributions to the advancement of the financial planning profession. The Award is presented to an individual who has realized outstanding achievements in service to society, academia, government, and professional activities. [Learn more about LeCount and his many contributions to the financial planning profession.](#)

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!](#)



**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.

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