



Take 5

September 2025

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



The AI Revolution is Coming to FPA Annual Conference 2025

AI is no longer just a new and shiny tool. It's becoming fundamental to how financial advice is delivered, scaled, and experienced. But with that power comes responsibility. How can financial planners adopt AI in a way that aligns with their values, improves client service, and maintains trust? Join us at [FPA Annual Conference 2025](#) in Las Vegas from November 3-5 to explore these issues during a keynote panel with some of the leading thinkers in artificial intelligence. [Join us to be part of the conversation!](#)

The All-New FPA MediaSource is Live and Operational!

We're thrilled to announce that the new and improved FPA MediaSource is now live! The platform, which connects FPA members with journalists working on financial planning-related stories, has been completely refreshed with a new look and a more intuitive, user-friendly interface. Additionally, participating members can now view their full history of media query responses. [Learn more about FPA MediaSource and how you can take part!](#)

Turning Insight Into Action: Using the FPA® Competency Model™

Building technical expertise is only half the journey. What sets exceptional planners apart is how they lead, communicate, and adapt in a changing world. In the second article of our FPA® Competency Model™ content series, you'll discover how to apply the model to strengthen trust with clients, make better ethical decisions, manage your time more intentionally, and navigate uncertainty with confidence. It's packed with actionable insights for planners at all levels, whether you're just beginning your career or evolving into a leadership role. Take your next step toward becoming the kind of professional people trust, follow, and refer. [Read the article.](#)

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

FPA Members can now access the September 2025 issue of the *Journal of Financial Planning* to learn about helping clients navigate divorce, guiding widowed clients, cross-border transactions, reassessing firm operations, exploring planner pain points and client crises in financial planning, 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

FPA LIVE: Brian Wallheimer on the State of Financial Services Trade Media

Tune in to this [recorded FPA LIVE conversation](#) as we sit down with Brian Wallheimer, Editor-in-Chief of Financial Planning magazine, to explore the evolving world of financial services trade media. We discuss how publications like Financial Planning are adapting to shifts in how audiences consume content, what topics and trends are resonating most with readers right now, and how the rise of digital media has reshaped the way industry journalism is produced and delivered. Whether you're a loyal reader or simply curious about how financial news is made in today's fast-moving landscape, this behind-the-scenes conversation offers valuable insights into the media that's covering the financial planning profession.

FPA of Miami Honored for Outstanding Pro Bono Financial Planning Initiatives

FPA and the Foundation for Financial Planning (FFP) are pleased to announce the FPA of Miami as the recipient of the 2025 Power of Financial Planning Award. The award is in recognition of their commitment to delivering pro bono financial planning in the spirit of FPA's Primary Aim: To elevate the profession that transforms lives through the power of financial planning. In its seventh year, the Power of Financial Planning Award recognizes an FPA chapter and its members' efforts over the previous 12 months to provide quality pro bono financial planning and advice to underserved populations. [Learn more about FPA of Miami's outstanding work!](#)

FPA Recognizes Individuals Who Improve the Profession and Benefit Society

FPA is proud to announce Preston D. Cherry, Ph.D., AFC®, CFT™, CFP®, and Lizbeth Menjivar, ChFC, as recipients of the Association's 2025 Heart of Financial Planning Award. The award recognizes financial planning professionals, firms, and organizations that demonstrate remarkable commitment and passion for contributing to or giving back to the financial planning community and/or public. Awardees exemplify the spirit of financial planning and represent FPA's goal to elevate the profession that transforms lives. [Learn more about our Heart of Financial Planning awardees!](#)

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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.

Support the Advancement
of Your Profession

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