**FPA “TAKE 5” FOR JULY 2015**

**Attention FPA Chapter Leaders:**

Each month FPA will provide you with a quick rundown of five news items worth sharing with chapter members at meetings, events and in newsletters. If you have any questions or need any clarification, please email Ben Lewis at BLewis@OneFPA.org.

1. **Access Exclusive Member Benefits Today**

Did you know that FPA offers members a wide range of exclusive discounts on various services, programs and products designed to help you in your work and business? The FPA Member Discount Program is a unique offering for members to access great deals by some of the best program and service providers in – and out – of the financial services industry. [Access](http://www.onefpa.org/Membership/Pages/FPAMemberDiscountProgram.aspx) the FPA Member Discount Program today to get deals on services and products for back office support, technology, marketing, insurance, education, research and much more.

And don’t just take our word for it, this is what FPA member Brian Fricke, CFP® has to say about the program: *“A great way to support the mission and vision of FPA is by taking advantage of the* [*FPA Member Discount Program.*](http://www.onefpa.org/Membership/Pages/FPAMemberDiscountProgram.aspx) *I’m not responsible for most purchasing decisions in my business, but I do make sure those that are responsible know about this great member benefit!”*

1. **Get the Latest Original Research on Investing by RPI and *Journal of Financial Planning***

The FPA Research and Practice Institute™ (RPI) has been engaging in original research on a wide array of subjects of importance to financial planners and the latest study is now available. The [2015 Trends in Investing Survey](https://www.onefpa.org/business-success/Pages/2015InvestingSurvey.aspx), done in collaboration with the *Journal of Financial Planning*, looks at how financial planners are using and recommending different investment vehicles today and where they will look to invest over the coming year. The survey, which has been conducted regularly since 2006, revealed that Exchange-Traded Funds (ETFs) have supplanted mutual funds as the preferred investment vehicle by planners.

And keep an eye out for more research coming out later this year, including a social media study that was conducted in partnership with LinkedIn and a Social Security study that is being done with AARP and CNBC.

1. **FPA Annual Conference Registration is Now Open**

Register now to attend the advanced technical conference for CFP® professionals – the [FPA Annual Conference – BE Boston 2015](http://fpa-be.org/) that will be held on September 26-28 to gain new practice management knowledge, skills and resources. The schedule is jam-packed with insightful sessions that will help attendees be more knowledgeable professionals and better business owners. Confirmed keynote speakers include Olympic Gold Medalist Jim Craig, Futurist Dr. Michio Kaku, Marketing Strategist David Meerman Scott, Employee Benefits Attorney Marcia Wagner and Keynote Host Jill Schlesinger, CFP® of CBS News.

The conference will also feature a Business Rapid Fire Session and Business Consulting Lounge where attendees can schedule appointments to meet with some of the profession’s best consultants and coaches! It will be a great opportunity to talk about your business challenges and gain valuable insight into marketing, technology, success planning, business planning and much more. Registration is open and members can now save with terrific early bird pricing. Register and learn more at [www.FPA-BE.org](http://www.FPA-BE.org)!

1. **Only a Few Spots Left! FPA Residency 2015 is Coming in October**

Financial planners who are newly minted, or soon-to-be, Certified Financial Planner™ (CFP®) professionals, can develop a solid foundation for the careers with the right experience. FPA is pleased to offer a one-of-a-kind experience for newer financial planners through FPA Residency 2015.

[FPA Residency 2015](https://www.onefpa.org/professional-education/residency/Pages/default.aspx), to be held Oct. 2-7 at the Inverness Hotel and Conference Center in Denver, Colo., provides a limited number of “residents” an exclusive opportunity to experience real financial planning scenarios and learn from preeminent thought leaders in the profession. Led by a faculty of highly experienced and nationally known financial planners, FPA Residency 2015 is an intensive case-study based learning approach that develops the skills required to become a confident and competent practitioner.

Attending residents can earn 28 Continuing Education (CE) credits **or** three-months experience toward the CFP Board’s three-year experience requirement. Those interested in attending must meet one of the following criteria:

* Completed the required CFP Board-registered program and are eligible to sit for the CFP® Certification Examination.
* Newly minted CFP® professional or a candidate for CFP® certification.
* CFP® professional who has held the certification for three years or less.

Registration is now open, but space is limited. [Register Today!](https://www.onefpa.org/professional-education/residency/Pages/default.aspx)

1. **Nominate Deserving Members for FPA Awards**

FPA is seeking nominations for two prestigious awards. The P. Kemp Fain, Jr., Award honors individuals for their significant contributions to the profession. The Heart of Financial Planning Award recognizes those contributing and giving back to the financial planning community and public through financial planning. So much volunteerism occurs at chapters, so this is a great opportunity to recognize volunteers for their efforts. Please think about members who are making important contributions and nominate them for these prestigious awards. FPA’s goal is one submission from each chapter.

Submissions are due July 1. [Nominate a colleague today!](http://www.onefpa.org/about/Pages/FPA%20Awards.aspx)

**Bonus Item: Nominations are Open for the 2016 FPA Board of Directors**

The FPA Board of Directors is the driving force behind FPA’s vision to be the professional membership association for the financial planning community and CFP® professionals. The Board is a group of dedicated, dynamic FPA members who recognize the impact that today’s decisions can have on the future.

Are you interested in being part of this high caliber strategic team that is leading the profession and the association while serving the members? If so, consider submitting your name as a candidate for the FPA Board of Directors or recommend a colleague for nomination.

Service on the FPA Board of Directors is a three-year commitment that begins January 1, 2016. Contact board@onefpa.org to request a board nomination packet. **Deadline for 2016 board nominations is Wednesday, July 1, 2015.**