**FPA “TAKE 5” FOR JUNE 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. We will provide you with a new “Take 5” at the beginning of each month. If you have any questions or need any clarification, please email Ben Lewis at [BLewis@OneFPA.org](mailto:BLewis@OneFPA.org).

1. **FPA Advocacy Day in Washington, D.C. is Right Around the Corner**

Our second annual [FPA D.C. Advocacy Day](https://www.onefpa.org/advocacy/Pages/Advocacy-Day.aspx) is just weeks away. We’re excited to say that so far 50 members from 19 states and 25 FPA chapters will be engaging policymakers and influencing legislation important to the profession. Join us in Washington D.C. on June 23-24 to make your voice heard in the halls of Congress! Participating in this important day will empower you to positively impact government officials at all levels – after last year’s event, we saw an increase of 18 cosponsors to one of our key pieces of legislation.

FPA will provide a structured experience including: training, materials, pre-event tips and tactics, a group room rate at a convenient hotel, appointments with the offices of your representatives and the opportunity to network with your fellow FPA members. All members are responsible for their own travel expenses and meals.

Help get the word out. [Register](https://www.onefpa.org/advocacy/Pages/Advocacy-Day.aspx) by June 1!

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 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 Michio Kaku, Marketing Strategist David Meerman Scott, and Keynote Host Jill Schlesinger, CFP® of CBS News.

**JUST ADDED KEYNOTE!** Attorney [Marcia Wagner](http://fpa-be.org/speakers/) specializes in pension and employee benefits law. She is principal of The Wagner Law Group, one of the nation’s largest boutique law firms specializing in ERISA, employee benefits and executive compensation. Wagner will provide insight into what Washington is doing on fiduciary matters, rollovers and tax reform and how that affects the profession.

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. **Two Preconferences Added to the FPA Annual Conference**

Diversity will take center stage at the FPA Annual Conference with the addition of special preconference events in partnership with PridePlanners and the Association of African American Financial Advisors (Quad-A). The events will allow attendees to engage in dialogue, before and during the FPA Annual Conference, and learn about the key issues impacting planners and clients of diverse backgrounds.

The PridePlanners preconference is focused on the theme of *Changing Landscapes: Financial Planning for LGBT Clients and/or Unmarried Couples* and will include sessions on Planning for Unmarried Couples, Socially Responsible Investing, Financial Planning for HIV Positive and Chronic Care Illnesses and much more. The Quad-A preconference is focused on the theme of *Building a New Vision of Success*. The agenda will focus on relevant topics that are critical for success in a changing demographic, economic and regulatory landscape.

Schedules for both preconference events are being finalized, but registration is now open with special rates for FPA, PridePlanners and Quad-A members. Registration for the PridePlanners preconference can be found [HERE](http://prideplanners.org/event-1864416/Registration) and registration for the Quad-A preconference can be found [HERE](http://www.aaafainc.com/conference/).

1. **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](mailto:board@onefpa.org) to request a board nomination packet. **Deadline for 2016 board nominations is Wednesday, July 1, 2015.**