FINANCIAL PLANNING ASSOCIATION

TAKE 5

SEPTEMBER 2017

FPA to focus efforts on serving the needs of next generation financial planners

FPA is proud to be the home for financial planning students, young professionals and career changers who are looking to make financial planning their vocation. While several initiatives are in early development with the FPA NexGen community, we have announced a partnership with FPA member and Dallas-based financial planner Hannah Moore, CFP® to produce, market and co-brand the *"You're a Financial Planner, Now What?"* podcast as a critical next step in connecting the professionals of today with the professionals of tomorrow. Learn more about the partnership!

Now Available: FPA Retreat 2017 recorded sessions and CE

FPA Retreat 2017 was a terrific event full of wonderful content, and we hope you were able to join us. Even if you missed the conference, we're pleased to announce the Retreat session recordings are now available. Don't miss this opportunity to access cutting edge content and earn continuing education (CE) credits. Access the FPA Retreat 2017 sessions now!

Learn something new while supporting the Foundation for Financial Planning

Forty thought leaders from the financial planning profession gathered to collaborate on ***The Art of Practicing and the Art of Communication in Financial Planning*** – a new book that provides readers with insights on how financial planning should be viewed and how professionals can engage their clients. All royalties from the sale of the book benefit the Foundation for Financial Planning and the work they are doing to make financial planning more accessible. The book is available in paperback and eBook through Amazon and bulk ordering is available through Sage Publications.

Coming soon: *Journal in the Round* podcast special on millennials

September's *Journal in the Round*, "Next Generation of Planners Shifting the Paradigm," is a special event hosted by Hannah Moore on her weekly podcast, *"You're a Financial Planner, Now What?"* In this episode, Hannah visits with *Journal* contributors Yusuf Abugideiri and Russell Kroeger who co-wrote a cover story on their 3-step model for serving millennial clients. You will be able to listen to the episode on iTunes, Stitcher and FinancialPlannerPodcast.com starting September 26 and also on FPA's learning website.

Increase your professional knowledge with the FPA Whitepaper Library

Serving clients and building a business requires financial planners to have access to the latest thinking available on both the practice and business of financial planning. The FPA Whitepaper Library is your opportunity to access whitepapers and content provided by many outstanding partners, including Vanguard, fi360, Cambridge, Commonwealth, T. Rowe Price and many others. Access this valuable content today to amplify your knowledge.

Refer New Members. Lower Your Dues. Help Grow FPA.

Through FPA's ***Member-Get-a-Member Program***, your referrals help the association grow by adding new members. Both you and those you refer save on membership dues. The more you refer, the more you save. Visit the FPA website now to learn how when you refer a member between September 1 and December 31, 2017, your rewards will double!

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.