FINANCIAL PLANNING ASSOCIATION

TAKE 5

NOVEMBER 2018

The FPA Strategic Framework

Since 2012, the FPA Board of Directors has been working to articulate what defines the association; FPA's role and charge in elevating the financial planning profession, and how our values, Primary Aim and Strategic Directive manifest themselves in service to our members. The result is a crystal clear Strategic Framework that guides the association's efforts today and into the future. And, read more about FPA's bold vision for the future in a special feature in the November issue of the *Journal of Financial Planning*.

Shaping the Financial Planning Profession Through FPA Advocacy

Want to know what FPA has been doing to advocate for the financial planning profession this year? Check out FPA's state and federal advocacy priorities for 2018, and learn more about FPA's long-term advocacy strategy to elevate the profession in an op-ed from FPA President Frank Paré, CFP® via *ThinkAdvisor.com*.

Connect and Learn from Your Peers in FPA Knowledge Circles

Achieve in-depth examination of financial planning issues, trends, and regulations via FPA Knowledge Circles. These specialty communities bring financial planners together from across the globe, helping to hone your skills and expertise within the profession. From Applied Behavioral Economics to Women in Finance and a wide range of topics in between, you have the opportunity to engage with others and share content and ideas on numerous financial planning and profession-focused topics through 11 FPA Knowledge Circles. Join an FPA Knowledge Circle now.

2018 FPA Annual Conference Recordings Now Available

Recordings of our most popular sessions from the 2018 FPA Annual Conference are now available. Listen to the best speakers in the financial planning profession to discover more about the new tax laws, health care reform, and best practices for retirement income. Learn now and earn up to 15 hours of CFP® CE credits.

New Pro Bono Financial Planning Training Course Available

FPA and the Foundation for Financial Planning (FFP), in partnership with Kaplan, have launched a new training program for volunteer financial planners who want to provide pro bono financial planning to vulnerable persons. This free, online course will help financial planners understand the basics of how to provide pro bono services and is available for 1 CFP® CE credit. FPA requires that all members complete this course before providing any pro bono services. Access the training program today.

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An FPA Strategic Partner

Since 2009, FPA has partnered with Ryan Insurance Strategy Consultants to offer FPA members an industry-leading Long Term Disability plan, and recently launched a group voluntary Term Life plan. They also consult with advisory firms in making insurance product recommendations and their network of advisers are available to help solve more complicated insurance planning issues. Learn more at www.ryan-insurance.net.

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, please email Ben Lewis at BLewis@OneFPA.org or Ryanne Harrah at RHarrah@OneFPA.org.