



### Explore FPA's new Group Health Plan that will save you money!

The FPA Group Health Plan, created in partnership with Ryan Insurance Strategy Consultants (RISC), is available exclusively to FPA members and their employees, and is designed to meet your firm's health insurance needs while minimizing costs. Plans are available in most states for groups of 2-50, with rates approximately 25% lower than comparable ACA plans. [Learn more](#) and take a look at the second page of this Take 5!

### Stay compliant and get up to speed on new standards and regulations

The FPA Member Advocacy Council (MAC) released the *MAC Regulatory Compliance Toolkit* to help FPA members adhere to CFP Board's new [Code of Ethics and Standards of Conduct](#) and the SEC's "Regulation Best Interest" Rule. [Check out the toolkit now](#), and often as more resources and tools will be added.

### FPA Retreat 2020: Break out the BBQ sauce, y'all ... we're headed to Texas!

If you've been searching for those who share your commitment to changing people's lives through the power of financial planning, then you have to attend [FPA Retreat 2020](#). FPA Retreat is the place where advanced financial planning practitioners put their passion for planning to work in pursuing mastery, refining leadership skills and working together to shape the future of the profession. Join us May 4-7, 2020 at the idyllic [Hyatt Regency Lost Pines Resort](#) in Cedar Creek, Texas for insights on the topics that matter, discussions that get to the heart of financial planning and, let's be honest, one too many smoked ribs. Save \$200 when you [register now](#) with Early Bird pricing!

### Get the year's top research from the December 2019 issue of the *Journal of Financial Planning*

Want to stay on top of the most current trends, but only have so much time? Dive deeper into research selected as the most relevant from a blind peer review in the December issue of the *Journal of Financial Planning*. Last month's special report, "From Theory to Practice," shares insights and practical implications from the nine pieces of research presented at the 2019 FPA Annual Conference to help you stay up to date and informed. [Access](#) the December issue of the *Journal* now.

### Realize the power of your FPA membership

Enhance your expertise in financial planning through your FPA membership. Whether you want to learn more about [being a sole practitioner](#) on FPA Connect or engage in [interactive educational sessions](#) to build your knowledge and skills, you can count on FPA to support you. FPA is your one stop shop to discover all you need to know about financial planning and offers a variety of platforms and opportunities to do it. [Learn more](#) about your professional home and how we can help you in the new year!

### Do you want to get media queries in your inbox? Be a part of FPA MediaSource!

Reporters from around the country are sending out media queries to CFP® professional members of FPA each day. They provide FPA members with a great opportunity to actively engage reporters on the stories they are working on while providing them with an opportunity to build name recognition and awareness! Want to take part? Simply attend the All-Member Virtual Media Training on Feb. 26 at 4 pm ET to take the first step to being part of the system. [Register today!](#)

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**RYAN INSURANCE**  
STRATEGY CONSULTANTS  
*"Protecting Your Financial Plans Since 1978"*  
**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](http://www.ryan-insurance.net).



# FPA Group Health Plan

## DISCOVER FPA'S MEMBER-ONLY HEALTH PLAN

FPA is proud to be one of the first to market with a national group health plan exclusively for members, their employees, and their families! Now is your chance to control costs while giving your employees plan options designed specifically for their needs.

- Level premium self-funded plans for groups of 2-50 (medical underwriting required)
- Rates approximately 25%\*\* lower than comparable Affordable Care Act (ACA) plans
- Customized group health plans with different co-pays and deductibles are accessible
- Short-term medical plans, medi-gap products and HSA plans are also available

## GETTING STARTED

Visit the [FPA Group Health Plan website](#) or call Broker Source\*\*\* at 913-333-3381 for additional information about this FPA member-only group health plan and to [GET A QUOTE](#).

If you have any questions, please reach out to FPA Member Services at 800.322.4237 option 2 or [MemberServices@OneFPA.org](mailto:MemberServices@OneFPA.org).

"We saved thousands of dollars on a plan that's almost the same as our old one. I was surprised by how easy the process was. Ryan Insurance took care of all the setup and answered my questions right away. I've already recommended them to a colleague at another firm."

—Christine Damico, Director of Human Capital



<sup>†</sup> Due to individual state regulations, plans not yet available in DE, HI, MT, NC, NH, NY, and DC.

\* National General Benefits Solutions, incorporated in 1965, focuses on providing small- and mid-sized employers with benefits options previously only available to large employers – helping employers lower costs while providing quality benefits to their employees. Rated A- (Excellent) by A.M. Best.

\*\* Potential savings based on standard level premium self-funded plan rates compared to similar ACA rated products.

\*\*\* Broker Source has been selected by Ryan Insurance Strategy Consultants to provide the administration for the FPA Group Health Plans.

