



Take 5

June 2020

FPA Launches Enhanced Digital Experience and New Brand Promise

On May 20, FPA launched a revamped website (FinancialPlanningAssociation.org) and unveiled new branding. The upgrades to the digital experience for members come at a time when financial planning is more critical than ever, and when practitioners need the support of their peers and community to provide the best possible service to their clients and all who need their services. The new FPA website will provide members with easier and more flexible access to the benefits of FPA membership—growth, inspiration, amplification and belonging—and supply members with the tools, resources, insights and guidance they need to become the best financial planners they can be. The upgraded user experience also delivers on the association’s newly enhanced brand, including FPA’s new brand promise, *Change Tomorrows™*. [Learn more.](#)

Are You in Compliance with the New CFP® Standards?

As of June 30, all CFP® professionals will be required to adhere to the new CFP Board *Code of Ethics and Standards of Conduct*. To help members meet the terms of these new standards, the FPA Member Advocacy Council (MAC), in partnership with Rochelle Truzzi from Hardin Compliance Consulting, created the **FPA Compliance Toolkit for the New CFP® Standards** that includes model engagement letters, checklists and more. To ensure you’re as prepared as possible, [check out the new toolkit now.](#)

New Research: Financial Advisers Feeling Bearish for the Next Six Months

FPA, the *Journal of Financial Planning* and Janus Henderson Investors released the 2020 Trends In Investing Survey that shows where financial advisers are investing today and where they plan to invest in the coming year. The survey also reveals how financial planners are feeling about the pandemic and their outlook for the economy, insights from your peers on investment trends, and more. [Download the 2020 Trends in Investing Survey report now.](#)

Call for Applications: 2021 FPA Board of Directors

Are you passionate about elevating the profession that transforms lives through the power of financial planning? If you're ready to take on a leadership role, FPA invites you to consider submitting an application for service on the 2021 FPA Board of Directors. Join a group of dedicated, dynamic FPA leaders who recognize the importance of today's actions on the future of the profession by contacting FPABoard@OneFPA.org to receive a board application package. Applications are due July 1, 2020. [Learn more about FPA Board service and how you can apply.](#)

FPA Offers Online Resource Center to Help Navigate Market Fluctuations

As you cope with the fluctuations in the markets stemming from the spread of Covid-19, FPA is supporting financial planners by offering an online Volatility Resource Center to help financial planners navigate the markets and better serve their clients. The majority of the resources are available to all financial planners, regardless of FPA membership status. [Access now.](#)

FPA and CNBC launch co-branded 'Money Matters' newsletter—now available!

Want the latest investments and personal finance headlines delivered to your inbox twice each month? FPA and CNBC are collaborating to publish the co-branded *Money Matters* newsletter exclusively for FPA members. Delivered twice each month, the newsletter delivers the latest headlines from CNBC that you need to read. [Opt-in for Money Matters now.](#)

Take 5 is Brought to You By Ryan Insurance Strategy Consultants

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.

