



Take 5

September 2020

FPA of Metro New York Receives Power of Financial Planning Award

FPA and the Foundation for Financial Planning (FFP) are proud to award the FPA of Metro New York the [2020 Power of Financial Planning Award](#) in recognition of their commitment to deliver pro bono financial planning in the spirit of FPA's Primary Aim: To elevate the profession that transforms lives through the power of financial planning. Now in its second year, the Power of Financial Planning Award recognizes an FPA chapter and its members' efforts to provide free, no-strings-attached, objective financial planning advice to underserved populations during a 12-month period from July 1, 2019 to June 30, 2020.

FPA is Going Online with a Digital 2020 FPA Annual Conference

In response to the ongoing public health threat and the need for social distancing, FPA is moving its [2020 FPA Annual Conference](#) from the Phoenix Convention Center to the comfort of living rooms and offices across the country Sept. 30 – Oct. 2, 2020. The immersive, three-day experience will feature best-in-class education content that builds on financial planning competencies and leads to the mastery of practice and business of financial planning. Those attending the conference will also receive complimentary access to the Academy of Financial Services (AFS) 2020 Annual Meeting, which is being held in conjunction with the first two days of the 2020 FPA Digital Annual Conference. Learn innovative solutions, build new connections and reignite your passion for financial planning. [Register now.](#)

FPA, Financial Planning Coalition Comment on DOL's Proposed Rule Package

The Financial Planning Coalition ("Coalition")—comprising FPA, CFP Board, and NAPFA submitted a [comment letter](#) on Aug. 6, 2020 to express strong disagreement with the U.S. Department of Labor's ("DOL") proposed [Retirement Investment Advice Rule Package](#).

FPA Online Learning Center: Learn from Top Financial Planning Leaders

Master the practice and business of financial planning by taking advantage of the many live webinars that are free to FPA members. More than half of these programs offer CE credit for CFP® professionals, and include courses that fulfill the two-hour professional conduct requirement. Through FPA resources, CFP® professionals can easily meet and excel continuing education requirements. [Learn more.](#)

New to the profession? Check out the *FPA Next Generation Planner*

In this month's *FPA Next Generation Planner*, learn from Joey Stemmler, CFP® and David G. Hampton on what you should look for in your compensation package, and get a glimpse into the fee-and-commission compensation type from Daniel M. Yerger, MBA, CFP®, ChFC®, AIF®, CDFIA®. Additionally, Trudy Turner, CPA/PFS, CFP®, CPWA® will share some tips on how to see the positive in the current pandemic environment. [View the September issue.](#)

Thank you to TD Ameritrade Institutional and Ryan Insurance Strategy Consultants for powering the *FPA Next Generation Planner*.

FPA and CNBC co-branded 'Money Matters' newsletter

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!](#)

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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.

