



# Take 5

October 2020

## **Dennis Moore, CFP® Elected 2021 FPA President-elect**

FPA is [excited to announce](#) that Dennis Moore, CFP® will serve as the 2021 FPA President-elect beginning Jan. 1, 2021. Moore has served in various leadership roles for the association including the FPA of Dallas/Ft. Worth Board of Directors, the OneFPA Advisory Task Force, the FPA Alliance Forum, and as chair for the FPA Pro Bono Committee. FPA is also pleased to welcome George Fernández, CFP®, Lisa Kirchenbauer, CFP®, and Paul Brahim, CFP® who will serve three-year terms on the FPA Board of Directors beginning Jan. 1, 2021.

## **New Philanthropic Solutions in Financial Planning Certificate Program**

To help financial planners guide clients on philanthropic and charitable giving, FPA and the American Heart Association launched a new certificate program, [Philanthropic Solutions in Financial Planning](#). The certificate program explores the benefits of charitable giving and how philanthropic opportunities can be designed to meet long-term client objectives. Financial planners who complete the certificate program will receive membership into the [AHA Professional Advisor Network](#), a digital badge and certificate, and can earn up to six CFP® CE credits. Additionally, eligible participants can join AHA's professional advisor referral program to connect with charitable donors. [Register now.](#)

## **FPA is Changing Tomorrows™ of underserved and at-risk populations**

FPA is committed to ensuring that the possibility of a brighter future is readily available to all who need these services but cannot afford or access them. Through the FPA Pro Bono Program, passionate financial planning practitioners are connected to individuals, families, and communities in need. [Volunteer now](#) to transform lives through the power of financial planning.

### Diversity & Inclusion: Connect with your FPA Community

FPA strives to create an inclusive culture where diversity is seen as a value of the association to elevate the profession that transforms lives through the power of financial planning. FPA is home to numerous peer-to-peer online learning communities for individuals with a diverse background, or who serve diverse communities. Engage with your peers to learn new perspectives and share ideas. [Explore FPA communities and connect today.](#)

### What are your peers learning this month?

Dive deeper into this month's *Journal of Financial Planning* to learn about tax planning, post Covid-19 employee benefits, charitable giving, the science of success, and more. [Check out the October issue of the \*Journal of Financial Planning\*.](#) And thank you to our proud partner Ryan Insurance Strategy Consultants for powering the October 2020 issue of the *Journal of Financial Planning*.

### New research report: The Impending Succession Cliff

Among advisers planning to retire in the next 10 years, 26 percent are unsure of their succession plan. With the right successor, advisers can preserve their legacy and ensure their clients are well-served after they exit the business. FPA invites you to participate in a new, confidential [research study](#) sponsored by [Cerulli Associates](#). For your participation, you will receive a complimentary report based on key findings from Cerulli's latest research update on succession preparation challenges, assessing practice value, and grooming a successor. [Get started!](#)

## 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](http://www.ryan-insurance.net).



**RYAN INSURANCE**  
STRATEGY CONSULTANTS  
*"Protecting Your Financial Plans Since 1978"*



# Your Health, Your Plan, Your Choice

Explore your options with FPA Group Health Plans. These customizable plans allow you to control costs while giving your employees plan options that are designed specifically for their needs.

Your FPA Group Health Plan gives you:

- ACA group plans along with alternate funded plan options
- Custom group health plans with different co-pays and deductibles
- Deductible credit for the same calendar year
- Available short-term medical plans, medi-gap products and HSA plans

To get a quote, [click here](#) or call (913) 777-7734.



***“FPA’s group health plan is an incredibly valuable benefit, saving me hundreds of dollars per month. The cost savings more than pays for my membership. It has truly been a game changer for our firm.”***

Randy Bruns, CFP® RICP®  
Principal | Senior Financial Planner  
Model Wealth, Inc.



[financialplanningassociation.org/fpa-group-health-plan](https://financialplanningassociation.org/fpa-group-health-plan)