



# Take 5

November 2020

## **FPA Introduces Cybersecurity for Financial Planners: An FPA Certificate Program**

To help financial planners protect data and comply with SEC and FINRA requirements, FPA launched **[Cybersecurity for Financial Planners: An FPA Certificate Program](#)**. The program, developed in partnership with FCI, guides financial planners through a step-by-step process to establish a customized cybersecurity plan that ensures they are adopting reliable security measures that safeguard client data and provide a record of the firm's cybersecurity practices. Similar to a workshop, those completing the course will receive a digital certificate for accomplishment and have a completed, compliant cybersecurity plan for their firm. CERTIFIED FINANCIAL PLANNER™ professionals completing the entire program will earn 2.5 CFP® CE credits. [Register for the certificate program.](#)

## **What is New at FPA? Check Out the Latest FPA Quarterly 'Snapshot'**

FPA is pleased to share the third quarter 2020 'Snapshot' to keep you informed of new FPA membership benefits and activities that support you and the financial planning profession. Each quarter, FPA reports on the most significant developments in member benefits and services in the areas of learn, lead and connect. [Access the third quarter 2020 Snapshot now.](#)

## **What Are Your Peers Learning This Month?**

Dive deeper into this month's *Journal of Financial Planning* to learn about advancing diversity and inclusion within the profession, and marketing tools to grow your practice and streamline processes. The *Journal* also explores how to improve your client experience, longevity planning, and more. [Check out the November issue of the \*Journal of Financial Planning\*.](#)

*\*Thank you to our proud partner Ryan Insurance Strategy Consultants for powering the November 2020 issue of the Journal of Financial Planning.*

### FPA NexGen® Elects New Leadership

FPA NexGen, a community that supports the advancement of new financial planning professionals, is pleased to announce Amie Agamata, CFP®, ChFC®, RICP® as 2020 Local Leader Coordinator, Kevin R. Clark, CFP®, CIMA® as 2020 President-elect, and Megan Abbott, MBA, MA, EA as 2020 Public Relations Coordinator. [Learn more about FPA NexGen.](#)

### FPA is Changing Tomorrows™ Through the Power of Pro Bono Financial Planning

In these tumultuous times, FPA chapters and members are committed to ensuring pro bono financial planning is available to those in need. Through their dedication, thousands of individuals and families across the country are getting free, no-strings-attached, financial planning advice to recover from financial strains caused by the pandemic, a cancer diagnosis, or other unexpected life events. [Learn how the FPA Pro Bono Program is making an impact.](#)

### 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. This is a great opportunity for FPA members to engage with reporters on upcoming stories and build name recognition and awareness. Want to take part? Simply attend the All-Member Virtual Media Training on Nov. 18 at 4:00 p.m. ET to take the first step in working with the media. [Register today!](#)

## 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).



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# 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.

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***“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)