



# Take 5

January 2021

## Happy New Year! Time to Enjoy all FPA Has to Offer You

Start 2021 on the right foot! Access all of your FPA member benefits, including [on-demand webinars](#), digital issues of the [Journal of Financial Planning](#), conversations with your peers on [FPA Connect](#), and more. If you need any assistance, please [contact us](#). We look forward to being here for you, and elevating the profession that transforms lives through the power of financial planning!

## Patrick D. Mahoney Assumes Role as FPA's CEO

FPA is pleased to welcome Patrick D. Mahoney as the Association's new chief executive officer effective January 1. Mahoney is an experienced business leader and strategist with a background across diverse organizations in the financial services, technology and mission-based sectors. His career began in product development and general management in the U.S. and Asia, later evolving to sales, marketing and general management in non-profit and for-profit organizations. A former operations executive with S&P Global, past chief marketing officer for IEEE, and former president and CEO of IEEE GlobalSpec, Mahoney has brought and will continue to bring significant marketing, business development and financial oversight to FPA. As CEO, Mahoney will continue to lead the Association's day-to-day management and report to the FPA Board of Directors. [Tune into this podcast to learn more.](#)

## What Are Your Peers Learning This Month?

Dive deeper into this month's *Journal of Financial Planning* to learn about college planning, how financial services can advance as a trusted profession, liability insurance, pandemic planning lessons, and more. [Check out the January issue of the Journal of Financial Planning.](#) Join [this month's roundtable discussion](#) to ask the *Journal* authors questions on their articles featured in the January issue.

*\*Thank you to our proud partner Ryan Insurance Strategy Consultants for powering the January 2021 issue of the Journal of Financial Planning.*

### 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.

### YAFPNW Podcast: Giving Career Changers a Jumpstart

Dominique Henderson, CFP®, founder of DJH Capital Management and Jumpstart Coaching Lab, shares tips on how to help career changers find their footing and create a viable career path. In this episode of *You're a Financial Planner, Now What?*, you'll hear Henderson's views on what drives financial planners, the importance of soft skills, examples of career paths, his career challenges, marketing tips for reaching new clients, and more. [Tune into this podcast now.](#)

### Making Philanthropy as Part of Your Financial Practice

Join Juan Ros, CFP®, AEP®, CSPG, CEPA, CVGA, financial adviser with Forum Financial Management and faculty member with the American Institute for Philanthropic Studies, to get a tangible action plan to incorporate philanthropic planning into your advisory practice, attract more next-generation clients to your business, and empower existing clients to make the most of their planned giving efforts. This live Knowledge Circle event will take place on Feb. 9 at 3 p.m. ET. [Register now.](#) And be sure to explore the benefits of charitable giving and how philanthropic opportunities can be designed to meet long-term client objectives by [registering](#) for Philanthropic Solutions in Financial Planning, a six-course certificate program developed by FPA and the American Heart Association.

## 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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Randy Bruns, CFP® RICP®  
Principal | Senior Financial Planner  
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