



FINANCIAL
PLANNING
ASSOCIATION

Take 5

An update on the programs and services that make FPA *your partner in planning*[™]



June 2024



Unlock Your Potential at the FPA Annual Conference 2024

Get ready to transform your business and ignite your passion for growth at [FPA Annual Conference 2024](#)! Registration is now open for this must-attend event, designed to elevate your skills and expand your network. Join a dynamic community of like-minded professionals, learn from industry trailblazers, and immerse yourself in innovative ideas and strategies. Connect with some of the brightest minds in the field, share your experiences, and discover new ways to drive your success. This exclusive event is crafted just for you—don't let it pass you by. [Grab your spot today and enjoy early bird pricing](#). Mark your calendar for September 18-20 in Columbus, Ohio, and get ready for an unforgettable experience!



You Won't Want to Miss FPA NexGen Gathering 2024!

As the premier event designed specifically for newer professionals like you, join us in sunny Phoenix, from August 20-22 for [FPA NexGen Gathering 2024](#). It's the perfect opportunity for those entering or within their first eight years in the profession. You'll be able to engage in enlightening conversations that will expand your knowledge, sharpen your skills, and fuel your passion for financial planning. [Early bird pricing is available until May 31!](#)

The 2023 FPA Annual Report

Over the past year, FPA leaders and staff worked hard to make the Association your partner in planning through Practice Support, Learning, Advocacy, and Networking. Learn about those efforts and the many programs, services, and events that are driving the value of membership in the recently released 2023 FPA Annual Report. The report looks at how FPA works for you and includes an update on membership and the 2023 audited financial statements. [Read the 2023 FPA Annual Report now.](#)

The June Journal of Financial Planning Is Now Available

FPA Members can now read the June 2024 issue of the *Journal of Financial Planning* to learn about the value of designations, creating a better stakeholder experience, sustainability in real estate investing, incorporating ESG, working with widows, a process for automating your practice, optimal retirement glide paths, the latest annual Trends in Investing survey results, and much more. Access the latest issue of the [Journal now.](#)



Where Are Financial Planners Investing Now? This Report Lets You Know.

Discover the latest insights from the 2024 Trends in Investing survey conducted by FPA and the *Journal of Financial Planning*. Dive into the investment preferences of over 200 financial professionals as they navigate the increasingly dynamic investment landscape. Explore the survey's findings on investment preferences, life insurance, economic outlook, and much more. [Download the 2024 Trends in Investing report now!](#)

FPA Insurance Programs: Protecting You and Your Business

As your partner in planning, FPA wants to help you protect your business and employees through various insurance programs exclusively offered to our valued members. Learn about the full menu of programs available to you, including Group Medical Plans, Group Long-Term Disability, Group Short-Term Disability, Group Term Life and Accidental Death and Dismemberment, Group Vision, Group Dental, Business Overhead Expense, Errors and Omissions Insurance, Cyber Liability and Data Breach Insurance, Investment Advisor Surety Bond, among others. All FPA insurance programs are offered through Ryan Insurance Strategy Consultants, one of the profession's leading providers of insurance services. [Learn more.](#)

Join the Community: Connect with Your Peers on the All-New FPA Connect

Looking to connect with other financial planners and FPA members from around the world? Look no further than the all-new FPA Connect platform! With a sleek homepage featuring an activity feed, it's now easier than ever to stay up-to-date with the latest discussions and news. Plus, the improved community library makes it a breeze to navigate and find the information you need when you need it. Best of all, access to this valuable resource is just one of the many benefits of FPA membership. So why wait? [Start connecting today!](#)



**Support the Advancement
of Your Profession**

The [FPA Political Action Committee \(FPA PAC\)](#), the only PAC focused on advancing the financial planning profession, provides an important seat at the table, forges relationships with lawmakers and their staffs, and provides an opportunity to share the financial planning story. There is much work to do and every dollar counts. To help us fight for your profession, we ask you to make a contribution to support your FPA PAC. Whether you contribute \$50 or \$5,000, every dollar is appreciated and will support advocacy efforts that move your profession forward.

[DONATE TODAY!](#)

