



FINANCIAL
PLANNING
ASSOCIATION

Take 5

August 2024

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



Make Valuable Connections at FPA Annual Conference 2024!

Join us at the [FPA Annual Conference 2024](#), the premier event for financial planning professionals like you! To be held in Columbus, Ohio, from September 18-20, this is your opportunity to connect with a vibrant community of peers, where you can exchange ideas, share best practices, and learn best practices for advancing in your career and business. Take part in engaging sessions and workshops while expanding your network with other dedicated financial planners. Don't miss out on this chance to elevate your practice and build lasting relationships that will drive your success in the ever-evolving world of financial planning. [Register now!](#)

Fulfill Your IAR CE Obligation with Kitces IAR Ethics CE Day on August 29

Kitces IAR Ethics CE Day is the ultimate solution for Investment Adviser Representatives (IARs) to fulfill their [CE obligations](#). Join us on August 29 for virtual sessions led by experts in ethics and regulation, earning your 6 hours of IAR Ethics CE while also gaining 6 hours of CE for CFP®, CIMA, CPA, and other designations. There are no vendors or sponsors—just pure, high-quality content. Plus, part of your registration will be sent to your local FPA chapter to support other programs that support YOU. Don't miss out! [Register today for \\$199 \(general admission\) or \\$149 \(Kitces Premier members\)](#).

Engaging Conversations with Industry Thought Leaders on FPA LIVE!

Tune in to [FPA LIVE](#)—a fun series of conversations with interesting people doing interesting things in and out of financial planning. Each conversation is held live over FPA's social media channels and available to you – on-demand – through the FPA Business Hub. We're chatting with industry thought leaders, top practitioners, organizational leaders, well-known speakers, and many others to discuss topics and issues relevant to you as a financial planner. [Check out FPA LIVE today and stand by for more great content coming soon in the weeks and months ahead!](#)

The August Journal of Financial Planning Is Now Available

FPA Members can now read the August 2024 issue of the *Journal of Financial Planning* to learn about beneficial ownership and what it means for small business clients, developing your sales skills, IRC Section 1042 for retirement and exit planning, aligning client goals and needs, revocable trusts in business succession, the latest in legislative advocacy, determining the run rate of monthly inflation, and much more. Access the latest issue of the [Journal now](#).

Catch Up on the Latest from FPA PAC

In the latest FPA Political Action Committee (FPA PAC) update, we're excited to share that we are focusing this year on enhancing awareness, boosting engagement, and ramping up our fundraising efforts. The hardworking FPA PAC Board has identified key areas for improvement, all outlined in the [Q2 2024 FPA PAC Debrief](#). As you dive into the details, we want to emphasize the incredible impact YOU can have on the FPA PAC and the future of the financial planning profession. Remember, the FPA PAC is YOUR PAC, and we're counting on your active involvement. [Support the FPA PAC today!](#)

Celebrating Landmark Financial Literacy Law in California

California Governor Gavin Newsom has signed into law AB 2927, which requires all high school students, starting with the 2030-2031 graduating class, to complete a standalone half-credit course in financial literacy. This is a significant achievement for the FPA of California, which has advocated for this law for the past 12 years! With the passage of AB 2927, 26 U.S. states now ensure that all high school graduates will have taken a financial literacy course. [Let's celebrate the FPA of California](#) for their dedicated efforts in supporting the financial wellness of the next generation!

The FPA Marketplace: Your One-Stop-Shop for Exclusive Discounts

Looking for exclusive savings and benefits? Look no further than the FPA Marketplace, powered by the Chalice Network®. As an FPA member, you can access a wide range of benefits tailored to your professional and personal needs. From insurance programs to fintech discounts, you'll find everything you need. Plus, you can take advantage of BenefitHub, where you can save thousands of dollars on a variety of services and programs. Benefit from the best offerings from top brands like Verizon, Costco, Geico, Avis, Hertz, Disney, AMC, Gap, and many more. Don't miss out on these amazing savings and benefits. [Access the FPA Marketplace now!](#)



**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!](#)

