



FINANCIAL
PLANNING
ASSOCIATION

Convince Your Manager Template for FPA Residency

Dear <Insert Manager's Name>,

I would like your approval to attend the [FPA Residency Program](#) (enter date) located in Denver, Colorado. This highly acclaimed and unique program is offered two times a year and is the only immersive learning program designed specifically to train new financial planners on the essential knowledge and skills needed to practice true financial planning with their clients.

The program is an intensive six-day, case-study-based workshop, led by a faculty of highly experienced and nationally known deans and mentors, with the goal of building confidence and skills needed to create meaningful relationships with clients. In addition to having the opportunity to role play meetings, practicing key communication and listening skills, I will learn to develop and deliver a comprehensive client centered financial life plan. I am confident, especially after speaking with graduates of the program, that I would apply this new knowledge directly to our organization. [Here's](#) an article in *Financial Advisor* magazine about the program.

Here are the other benefits:

1. Working with master CFP® practitioners, I gain their wisdom and insights on the real work of financial planning. By focusing on the client-centered nature of financial planning engagement, and creating a life plan that truly resonates, I will leave the program with the communication skills and confidence needed to build long lasting trusted relationships with clients. This is a clear value proposition I will bring to our firm's current and perspective clients.
2. Each program is limited to 30-35 planners, so the individualized attention from expert mentors offers feedback and reflection that is key to improving my work. What is unique about FPA Residency is that while I have technical knowledge of financial planning, this program offers training in the subtle and high-level skills that translate technical knowledge into wisdom for the benefit of the client.
3. By completing the program, I also receive credit hours towards my certification and can earn up to 28 CFP® continuing education credits or three months of experience toward CFP Board's three-year requirement.
4. I've broken down the approximate cost of my attendance below:

Airfare:	\$ xxx
Registration:	\$ xxx
Total:	\$ xxx

I will share key takeaways upon my return from the FPA Residency program, including those that we can implement immediately to benefit the organization. I am confident that my attendance at the program, and the resulting benefit to my development and the organization will far outweigh the investment you'll be making in approving this request.

FPA offers an early bird rate for those who register for the program by _____, which is a savings of up to \$500 (\$3,300 members/\$3,800 non-members). Thank you for your consideration!

Best,

[INSERT NAME]