



FINANCIAL  
PLANNING  
ASSOCIATION

# Take 5

December 2024

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



## Registration for FPA Annual Conference 2025 Is Open!

Join us for [FPA Annual Conference 2025](#) at the MGM Grand in Las Vegas, November 3-5, as we celebrate FPA's 25th anniversary! This special event brings financial planning planners together to connect, learn, and thrive. Gain insights from cutting-edge sessions, earn CE credits, and discover tools to enhance your skills and practice. Build your network with passionate peers, explore innovative ideas to advance your career, and revel in the energy of Las Vegas. [Register now with early bird savings](#) and make 2025 your year to connect, learn, and thrive with FPA!



## Early Bird Registration is Open for FPA Retreat 2025

Join us for [FPA Retreat 2025](#) in beautiful Chicago from April 28-30, 2025! This exciting event will occur at the stunning Hilton Chicago Oak Brook Resort and Conference Center on a sprawling 150-acre estate. The venue features the Audubon-certified 18-hole Willow Crest Golf Club, perfect for golf enthusiasts. You'll also have access to various amenities, including a serene lakeside outdoor pool, tennis, basketball, and volleyball courts, a luxurious spa, two golf simulators, and diverse dining options. Don't miss out on early bird registration—mark your calendars for an unforgettable experience in Chicago next April! [Register now!](#)



## Register Now and Save for FPA NexGen Gathering 2025!

If you couldn't join us for the FPA NexGen Gathering in August, you truly missed a remarkable experience! But don't worry. [FPA NexGen Gathering 2025](#) is set to happen at the Hilton Orlando Lake Buena Vista from August 26-28, 2025. This stunning venue is an Official Walt Disney World Hotel, providing attendees exclusive Disney perks, including direct access to Disney Springs. Don't miss out on the early bird registration now available, offering fantastic savings. [Register to join us!](#)

## The December *Journal of Financial Planning* Is Now Available

FPA Members can now read the December 2024 issue of the *Journal of Financial Planning* to learn about estate planning for clients with estranged family members, advancing women in financial services, estate planning and crypto, uncovering your niche, successful successions, strategic outsourcing, how divorce impacts tax planning, efficient portfolios with Social Security as an asset, and much more. Access the latest issue of the [Journal now.](#)



## Drive Business Growth with the Absolute Engagement Engine

Engaging with leads, differentiating the prospect experience, driving deeper conversations, measuring the quality of relationships, and uncovering and responding to referral opportunities. Each function is critical to driving new business growth in your practice, but each takes time and effort. Luckily, the Absolute Engagement Engine allows you to do all of this and more through a single platform that marries technology with a structured process to uncover and respond to what prospects and clients care about most. The best part is that FPA members can enjoy an exclusive 20% discount on this terrific platform! [Learn more and get started today!](#)

## FPA Members Can Contribute to TheStreet.com

Are you passionate about helping others achieve financial security in retirement? Retirement Daily on TheStreet.com seeks expert contributors to share their valuable insights with readers. As a contributor, you'll have the opportunity to showcase your expertise to a wide audience and establish yourself as a thought leader in retirement planning. If you are interested in contributing, please email [rpowell@allthingsretirement.com](mailto:rpowell@allthingsretirement.com) to express your interest!

## What are Financial Planners Like You Using In Their Tech Stack? Let's Find Out.

Bob Veres and Joel Bruckenstein are conducting their 2025 T3/Inside Information Software Survey, where financial professionals rate the software products and services they use. You're invited to give your evaluations and help the profession sort through more than 300 tech-related options. The survey typically takes 15-20 minutes to complete; you can skip over categories where you aren't using any of the programs. Once the data is compiled, the full report will be available to FPA members at no cost. [Take the survey 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!](#)**

