



# Take 5

January 2025

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



## Start the New Year with Purpose: Register for FPA Annual Conference 2025

Celebrate FPA's 25th anniversary in style by joining us at [FPA Annual Conference 2025](#), November 3–5 at the MGM Grand in Las Vegas! Connect with financial planners, students, academics, and partners in an inspiring setting. Attend cutting-edge sessions, earn CE credits, and explore tools to elevate your practice while building your network and advancing your career. Start 2025 with intention—Early Bird Registration is now open, so secure your spot and be part of this landmark celebration! [Register now with early savings!](#)



## Start the New Year Right: Register for FPA Retreat 2025

Kick off 2025 with growth, connection, and inspiration at [FPA Retreat 2025](#), April 28–30, at the beautiful Hilton Chicago Oak Brook Resort and Conference Center. Set on a 150-acre estate, this stunning venue features an Audubon-certified golf course, lakeside pool, tennis and basketball courts, a luxurious spa, and more—providing the perfect environment to recharge and connect with fellow professionals. Early Bird Registration is now open, so secure your spot today and make 2025 unforgettable! [Register now!](#)



## Start the New Year with a Plan: Register for FPA NexGen Gathering 2025

Make 2025 your year for connection and growth by registering for [FPA NexGen Gathering 2025](#), August 26–28 at the Hilton Orlando Lake Buena Vista, an Official Walt Disney World Hotel. Enjoy exclusive Disney perks like direct access to Disney Springs while engaging with peers in an inspiring environment. Early Bird Registration is now open—start the New Year off right by securing your spot and saving big! [Register to join us!](#)

## The January 2025 Issue of the *Journal of Financial Planning* Is Now Available

FPA Members can now access the January 2025 issue of the *Journal of Financial Planning* to learn about flood insurance, navigating IRMAA, anticipating upcoming tax policies, building your network, maximizing video on your website, soothing anxious clients, flexible estate planning, mitigating cyber threats, building trust through effective intersession communication, and much more. Access the latest issue of the [Journal now.](#)

## Read the CEO Quarterly Update To Learn About FPA's Activities in Q4 of 2024

To keep FPA Members and volunteer leaders apprised of what the Association is doing to support members and elevate the profession, FPA CEO Patrick D. Mahoney provided a quarterly CEO Update for Q4 of 2024. In the latest Update, Patrick shares his reflections on a year of success for FPA. [Read the CEO Update 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!](#)

## Live Webinar: Michael Kitces Talks Home Equity

Join Stephen Resch of Finance of America and Michael Kitces of Kitces.com as they discuss the often-overlooked use of home equity in a retirement plan. With seniors today controlling over \$14 trillion in equity and needing to plan for a 20-year or longer retirement, the inclusion of home equity in the planning process could enhance retirement outcomes. Join us on January 23 at 3:00 p.m. ET, when you'll learn about the different options for using home equity, using home equity to address planning shortfalls, and much more. [Register today!](#)

## Pro Bono Financial Planning is Important Among Future Financial Planners

The Foundation for Financial Planning (FFP) has released its Survey of Aspiring CFP® Professionals, revealing strong support for pro bono financial planning among those pursuing CFP® certification. The report builds on FFP's earlier findings, showing even greater enthusiasm for helping people in need among the next generation of financial planners. [View the report.](#)



**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!**

