



Take 5

February 2025

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



Growth, Connection, and Inspiration at FPA Retreat 2025!

If you want growth, connection, and inspiration, attend [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. Advance registration is now open, so secure your spot today with the lowest current registration rate! [Register now!](#)

Attention FPA Members: Open Enrollment is Open Until February 28!

Attention FPA members and employees! Open Enrollment runs from February 1–28, 2025, offering valuable insurance options, including guaranteed-issue group long-term and short-term disability plans (up to \$30,000/month for LTD), business overhead expense insurance (simplified underwriting for up to \$6,000/month), group term life and AD&D insurance (simplified underwriting for up to \$50,000), and group dental and vision coverage available anytime with no medical underwriting. Visit [AssociationInsuranceBenefits.com](#) for details, premium calculators, and applications. Current enrollees don't need to reapply unless they're adding a new product. And don't miss the informational webinars on [Feb. 13 at 3:00 p.m. EST](#) and [Feb. 18 at 12:00 p.m. EST](#) to learn more—register today!

Celebrate 25 Years of Impact with the '25 in 2025' Financial Wellness Pledge!

In honor of FPA's 25th Anniversary, we invite you to pledge 25 hours of pro bono service in 2025. You'll help individuals and families who cannot afford or access these transformative services by providing free financial planning and education. Start today by exploring training, local opportunities, and national initiatives like Homes For Our Troops. Together, we can make 2025 a year of giving back. [Take the pledge now!](#)

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

FPA Members can now access the February 2025 issue of the *Journal of Financial Planning* to learn about college funding, client communication, taxation and sports betting, professional development, digitally engaging next-generation clients, integrating life insurance in education funding, launching an effective internship program, navigating client engagement, and much more. Access the latest issue of the [Journal now.](#)



Fulfill Your IAR CE Obligation with Kitces IAR Ethics CE Day on August 28

Kitces IAR Ethics CE Day is the ultimate solution for Investment Adviser Representatives (IARs) to fulfill their CE obligations. Join us on Thursday, August 28, 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 \$247 (general admission) or \$197 (Kitces Premier members). [Register now!](#)

The Coverage You Need: FPA Insurance Programs

As your partner in planning, FPA wants to help members protect their businesses and employees through various insurance programs exclusively offered to our valued members. From Group Medical Plans and Disability Insurance to Business Overhead Expense Insurance and Cyber Liability and Data Breach Insurance, FPA and our partners at Ryan Insurance Strategy Consultants have you covered. Learn more about these and the many other insurance programs available exclusively to FPA members. [Get started!](#)

Tune In to FPA LIVE: They're Live and On-Demand!

Tune in to FPA LIVE, a fun series of conversations with interesting people doing interesting things in and out of financial planning. Each interview is held live over FPA's social media channels, and the entire library of conversations is available through the FPA Business Hub. Watch previous conversations with Daniel Pink, Matt Halloran, Julie Littlechild, Nicole Casperson, Jeff Bush, Erica Orange, and many others. [Check out FPA LIVE 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!](#)

