FPA FINANCIAL PLANNING ASSOCIATION 25 YEARS

Take 5

March 2025

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

Recharge and Grow at FPA Retreat 2025 – Register by March 24!

Join us for FPA Retreat 2025, April 28–30, at the breathtaking Hilton Chicago Oak Brook Resort and Conference Center. Nestled on a 150-acre estate, this premier venue offers an Audubon-certified golf course, a serene lakeside pool, tennis and basketball courts, a world-class spa, and more—the perfect backdrop to learn, connect, and recharge with fellow planners. Don't miss your chance to experience growth, inspiration, and meaningful conversations in a setting that fosters deep professional and personal connections. Registration closes on March 24!

Elevate Your Practice with Exclusive Client Insights

As an FPA member, you now have exclusive access to the Global Client Experience Study, powered by Dimensional. This customizable tool lets you evaluate your client experience, measure client sentiments, and understand your value—all critical for growing your practice. Gain insights to improve efficiency, benchmark client expectations, and discover opportunities while mitigating risks. Participation is free for FPA members, and you'll receive access to a personalized reporting dashboard to analyze client responses and compare data with peers. Register by April 28 to take advantage of this member-exclusive opportunity!

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!

Access the March 2025 Issue of the *Journal of Financial Planning*!

FPA Members can now access the March 2025 issue of the *Journal of Financial Planning* to learn about the Social Security Fairness Act, efficient hiring, selecting the right retirement community, team building during tax season, decoding the myths of bitcoin, exploring the wealthy's investment beliefs and preferences, flexing communication muscle, and much more. Access the latest issue of the *Journal* now.

Take 5

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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!

Live Webinar: Ed Slott's Top 2025 Tax-Season Conversations

Tax planning is the #1 most in-demand service for retirement savers today, yet many high-net-worth clients feel they aren't getting it from their advisers. With tax policy shifts on the horizon, advisers who deliver proactive tax strategies will stand out and grow their businesses in 2025. Join Ed Slott, CPA, America's IRA Expert, for a high-impact, must-attend session packed with the latest retirement tax strategies to protect your clients' savings and position you as the go-to expert in 2025. Join us for this exclusive live webinar on March 17 at 1:00 p.m. ET. Register today!

Valuable Connections Await at 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 open, so secure your spot and save big! Register to join us!

CFP® Ethics: Code of Ethics and Standards of Conduct

Join us on March 25 at 3:00 p.m. ET for this live learning session that will fulfill your requirement for CFP Board-approved Ethics CE. This program is designed to educate CFP® professionals on CFP Board's Code of Ethics and Standards of Conduct, which is effective July 1, 2024. This session qualifies for 2 CFP® CE credits. Register 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!