

The background of the entire page is a photograph of two women sitting at a table outdoors, possibly at a conference. The woman on the right is smiling and looking towards the woman on the left. They appear to be in a professional setting. The image is overlaid with a semi-transparent green filter. A yellow diagonal shape is present in the top left and bottom right corners of the page.

# WELCOME TO YOUR PROFESSIONAL HOME

The Financial Planning Association® (FPA®) is the indispensable resource for CFP® professionals. Our primary aim is to elevate the profession that transforms lives through the power of financial planning.

**Become a member now at [JoinFPA.org](https://JoinFPA.org)**

800.322.4237 | [MemberServices@OneFPA.org](mailto:MemberServices@OneFPA.org)



# FPA® IS YOUR PROFESSIONAL HOME

The Financial Planning Association® (FPA®) is the principal professional organization for CFP® professionals and the indispensable resource to help you supercharge the value of your CFP® certification and become the best planner you can be.

Simply put, we are the community that works together to elevate individual financial planners, regardless of compensation model or practice type, and the financial planning profession as a whole. We believe true financial planners provide an invaluable, critical service to society, and that CFP® professionals lead the way in the commitment to raise the bar for the clients they serve—from transaction to transformation.

## FPA BY THE NUMBERS



# 2000

The year that the International Association for Financial Planning (IAFP) and The Institute of Certified Financial Planners (ICFP) merged to form the Financial Planning Association.



“  
*FPA is the centralized, go-to source for the CFP® [professional]. There is no bigger community of CERTIFIED FINANCIAL PLANNER™ professionals in existence - both in the United States and throughout the world. It creates this community and this collaborative space for us all to share our best ideas and practices and get the support that’s needed when we experience a scenario that we’ve never come across before.*”

**Joe Pitzl, CFP®** | Managing Partner, Pitzl Financial



# EXPERIENCE THE POWER OF A CONNECTED COMMUNITY

Community matters at the Financial Planning Association, not only because of the value our affiliated financial planners gather when it comes to personal and professional growth, but in the power of idea sharing, passion and inspiration, which elevates the profession. Our members engage and connect with peers, FPA staff and countless thought leaders and influencers affiliated with the association in a variety of ways:

## Online Communities

- FPA Connect, our compliance-friendly online community, is the best place to find the questions, answers and topics that are most important to financial planners.
- The FPA Activate Facebook Group is a vibrant social media forum designed to be the go-to community for financial planners who want to fast track their careers and develop their financial planning skills.
- Our communities on Twitter, Facebook and LinkedIn are great ways to develop your financial planning skills and keep up-to-date with information and updates on FPA news and events.

## Engage with Planners in Your Area

Our members connect through FPA's unparalleled nationwide chapters to network, share ideas, attend local educational programs and events and participate in leadership opportunities.

## Knowledge Circles

In FPA Knowledge Circles, members discuss best practices on financial planning hot topics online, over the phone and in-person. Discussions are focused on interesting, relevant topics including:

- Business Success
- Investment Planning
- Public Policy
- Retirement Planning
- Women and Finance
- International Finance
- Tax Planning
- Academics

### FPA BY THE NUMBERS



# 86

**FPA has 86 chapters across the United States, allowing you to connect with financial planning professionals, FPA members and thought leaders right in your own backyard!**



*FPA is a fantastic place to develop the kind of networking required to help get your business to whatever next level is on your mind.*



**Daniel Moisand, CFP®** | Principal and Financial Adviser, Moisand Fitzgerald Tamayo, LLC



# LEARN AND GROW

## Become Your Best You with FPA

In the financial planning profession, while there are many diverse factors that contribute to success, there's simply no substitute for relevant, useful, quality content. FPA members receive a wealth of information from a variety of sources, such as:

### *The Journal of Financial Planning*

Members receive a monthly print subscription and unlimited digital access to the *Journal of Financial Planning*, the gold standard when it comes to credible thought leadership for the profession. Each issue allows members to dig into topics that matter while offering free CE credits.

### Quality Educational Programming

Enjoy complimentary access to all of the live webinars in the FPA Professional Development Learning Center. We strive to provide you with education that you can apply directly to your personal and professional development, while also fulfilling your CE requirements.

## FPA SmartBrief

Get a weekly digest of the latest news, policy updates and trends impacting the financial planning profession.

## FPA Practice Management Blog

Hear from CFP® professionals, subject matter experts and industry thought leaders who can help you run your business more efficiently, effectively and profitably through advice on topics such as:

- Marketing
- Compliance
- Operations
- Business and Career Development
- Client Communication and Meetings
- Customer Service
- Human Resources Issues

### FPA BY THE NUMBERS



# 91%

Percentage of FPA members who report that they read the *Journal of Financial Planning* every month.

*2017 FPA Member Survey*



“  
*There has to be a place where we can go to really learn and develop our skills as planners. And FPA has been the best resource that I've found.*  
”

**Hannah Moore, CFP®** | Owner, Guiding Wealth Management



# A PLATFORM TO GET INVOLVED

In listening to our members, we understand that the features and perks of FPA membership, while helpful for personal and professional growth, are rarely the primary reason financial planners become part of FPA. They join because they want to be part of something greater than themselves and to make an impact on their profession. FPA gives them a platform to do just that.

The collective contributions of our members are the most important component in fostering sustainable growth of the financial planning profession. Individually, we may struggle to drive true change forward, but together, there's nothing we cannot achieve.

## Lend Your Voice to Legislative Efforts

From the local and state FPA Advocacy Days, to the ability to influence the regulation of financial planning practices, FPA offers a wealth of opportunities for members to engage in protecting and guiding the profession.

## Make an Impact with Pro Bono Planning

FPA members can get involved in pro bono financial planning efforts at the national level, as well as in their own backyards via local chapter programs.

## Become a Go-To Expert for Media

Through media training and the FPA MediaSource\* program, members can make their voices count through access to local and national media.

## Share Your Expertise

FPA members are encouraged to read the writing guidelines and suggested writing topics on the *Journal of Financial Planning* website, and submit an article or a Letter to the Editor on a topic they are passionate about.

### FPA BY THE NUMBERS



# 61%

Percentage of FPA members that reported being most motivated by helping others.

2017 FPA Member Survey



*What can you do to get the most out of your FPA membership? The answer is get involved. There is nothing that has more impact. This completely shaped me as a financial planner and has been instrumental in my success with my firm from day one.*

**Evelyn Zohlen, MBA, MS, CFP®** | President, Inspired Financial

\* FPA MediaSource is an exclusive CFP® professional member benefit.



# BRIDGING THE GENERATION GAP AND BUILDING A SHARED FUTURE

Financial planners as a group are simply too diverse in age, experience, career path, wants and needs to separate into easily defined categories - and that's a good thing! FPA is home to both experienced and new financial planners, and nearly every planner in between, because our community focuses not on age, tenure, region or history, but on a shared commitment to making each other better, helping clients achieve their dreams and moving the profession forward.

To get a taste of the vibrant communities and conversations that make us who we are, check us out on the following platforms:

## **FPA Activate Facebook Group**

A social media forum designed to be the go-to community for financial planners who want to fast track their careers and develop their financial planning skills.

## “You’re A Financial Planner, Now What?” Podcast

Each week, FPA offers a brand-new edition of the “You’re A Financial Planner, Now What?” podcast, featuring influential guests offering inspirational stories, valuable insights and expert commentary on a wide range of financial planning topics. While the podcast aims to help new financial planners gain a foothold in the profession, the content and topics covered are often relevant to planners at every career stage.

## Twitter (@fpassociation and @FPAPubs)

With more than 38,000 followers between our two primary Twitter handles, Twitter offers an excellent way to keep up with FPA news at both the national and the local (chapter) level. The @fpassociation handle is our primary handle, while @FPAPubs is focused primarily on *Journal of Financial Planning* content.

### FPA BY THE NUMBERS



# 70%

Percentage of FPA members who are in the early-to mid-stage of their career.

2017 FPA Member Survey



“

*The one thing that I absolutely love and think is extremely special about FPA is we are an open community. We welcome all who support the practice and profession of financial planning regardless of business model and firm affiliation. That open community fosters collaboration and innovation and the exchange of ideas.*

”

**Marguerita M. Cheng, CFP®, RICP®** | CEO, Blue Ocean Global Wealth



# ACCESS TO CUTTING-EDGE FPA EVENTS

Our signature events are a powerful way for members and non-members alike to take their practice and the profession to the next level. FPA members receive attractive discounts for each of our conferences, including:

## FPA Annual Conference

The FPA Annual Conference is the largest gathering of CFP® professionals and thought leaders in financial planning, delivering an amazing opportunity to pursue personal growth by connecting with your peers and learning from the top minds in the profession. The event allows you to gain skills you can use year-round, share your ideas and be an integral part of moving our community forward.

## FPA Retreat

FPA Retreat is a genuinely unique experience fueled by the spirit of friendly discourse, a shared commitment to improvement and development and a structure without formal boundaries, creating an unmatched environment for learning, inspiration and making lifelong connections.

## FPA NexGen Gathering

This annual event provides an opportunity to discuss hot topics and trends facing the future of the financial planning profession and a chance for financial planners to get to know peers, colleagues and the FPA leadership in an intimate and free-flowing setting. The event welcomes all members of the financial planning community to experience the pulse, passion and vision of the next generation of financial planners.

## FPA Residency

Led by a faculty of highly-experienced and nationally-recognized deans and mentors, FPA Residency is a case study-based learning approach that develops the skills required to become a confident and competent practitioner. Class sizes are capped at 30 to allow for a more intimate and engaging experience.

## FPA Advocacy Day

FPA Advocacy seeks to advance and protect the financial planning profession by proactively seeking out those who vote on issues that affect its future. State Advocacy Days help you connect with your local legislators and regulators to build important relationships that help influence the right people.



“

*At FPA events you are able to connect with people that care about the profession, not just on a professional level, but on a deeply personal level.*

”

**Elissa Buie, CFP®** | CEO, Yeske Buie

### FPA BY THE NUMBERS



# 2/3

**Nearly two-thirds of FPA members stated that professional development is the most valuable benefit of membership.**

*2017 FPA Member Survey*



# A SUPPORT SYSTEM TO HELP GROW YOUR BUSINESS

To grow a healthy financial planning practice today, planners must have access to research, referrals and the latest tools for practice management. FPA offers a rich platform of business-building resources, including:

## **FPA Research and Practice Institute™ (RPI)**

RPI provides original research on business-centric topics and issues, including operations, personnel, human resources, marketing and technology. Detailed analysis, reports, whitepapers and resources based on the research will help you identify and address business gaps.

## **FPA Member Discounts**

FPA members are connected to exclusive savings from the top practice management products and services. These discounted business resources include financial planning software, marketing consultations, education and certification programs and group insurance plans.

## FPA Job Board

FPA members can explore career opportunities and search a large pool of applicants on FPA's Job Board, a centralized source for financial planning employment. Job seekers showcase their skills and work experience, and search for jobs by career stage, location and more. Employers and recruiters have access to a highly qualified talent pool.

## FPA Coaches Corner

This resource is your one-stop-shop for content and tools from the most recognized business coaches in the profession. Topics include marketing, business growth, compliance, cybersecurity, team development and the 'financial planner's mindset.'

## FPA PlannerSearch®\*

FPA PlannerSearch® is an online referral service where consumers can find a CFP® professional who best fits their needs. Planners utilize this tool to gain visibility among potential clients. Eligibility requirements apply.

### FPA BY THE NUMBERS



# 60%

Percentage of FPA members who cited client acquisition as their biggest challenge.

*2017 FPA Member Survey*



*FPA is really a place where advisors can come to form those relationships that are going to help them build their businesses throughout their career.*



**Kate Healy** | Managing Director,  
Generation Next at TD Ameritrade Institutional

\* FPA PlannerSearch® is an exclusive CFP® professional member benefit.



**Become a member now at [JoinFPA.org](https://JoinFPA.org)**

## About the Financial Planning Association

The Financial Planning Association® (FPA®) is the principal professional organization for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals, educators, financial services professionals and students who seek advancement in a growing, dynamic profession. Through a collaborative effort to provide more than 22,000 members with tools and resources for professional development, business success, advocacy and community, FPA is the indispensable force in the advancement of today's CFP® professional. Learn more about FPA at [JoinFPA.org](https://JoinFPA.org) and follow us on Twitter at [twitter.com/fpassociation](https://twitter.com/fpassociation).

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