



WELCOME TO YOUR PROFESSIONAL HOME

Our primary aim is to elevate the profession that transforms lives through the power of financial planning.

Hit the Ground Running at OneFPA.org!

800.322.4237 | MemberServices@OneFPA.org



MAKING THE MOST OF YOUR FPA MEMBERSHIP

Experience Superior Professional Development

- **Professional Development Learning Center:** Your online portal for continuing education that you actually want to consume
- **Journal of Financial Planning:** Our award-winning, peer-reviewed monthly publication
- **Financial Services Review:** Quarterly journal from the Academy of Financial Services and FPA
- **Money Magazine:** Complimentary monthly subscription to *Money Magazine*
- **FPA SmartBrief:** Weekly digest of industry news, policy updates and trends

Engage with Your Community

- **FPA Chapters:** Make connections through FPA's nationwide chapter network
- **FPA Connect:** Interact virtually with peers on our compliance-friendly online community forum
- **FPA Knowledge Circles:** Learn from your colleagues through topical dynamic online communities
- **FPA Annual Conference:** Get practical strategies from the largest gathering of CFP® professionals and financial planning thought leaders in the U.S.
- **FPA Retreat:** Join the profession's top leaders, thinkers and change-makers for in-depth learning

Grow Your Business

- **FPA Member Discounts:** Member discounts on industry-leading products and services

- **FPA Coaches Corner:** Your one-stop-shop for content, tools and resources from leaders in the profession
- **FPA Job Board:** Explore job listings or recruit from the most qualified financial planning talent pool
- **Media Training:** Learn media skills from tactics to interviews
- **FPA PlannerSearch®:** Connect with consumers through this online search tool for CFP® professionals

Contribute to the Profession

- **Advocacy Toolkit:** Access sample letters, templates and tips to address your government reps
- **Advocacy Days:** Hands-on sessions with legislators in Washington D.C. and your home state to discuss topics germane to the profession and industry
- **Financial Planning Coalition:** Research and data-driven projects that help influence public policy decisions on issues that advance the profession
- **FPA Political Action Committee (FPA PAC):** Represents financial planners and provides access to leaders who share your passion for the profession
- **FPA Member Advocacy Council (MAC):** An influential voice on regulatory matters that impact you and your business

Mark Your Calendar



2018 FPA Annual Conference

October 3-5, 2018
Chicago, IL

October 19-24, 2018
Denver, CO

2018 FPA Fall Residency

2019 FPA Retreat

May 6-9, 2019
La Jolla, CA

October 16-18, 2019
Minneapolis, MN

2019 FPA Annual Conference

Explore all of your member benefits at OneFPA.org



Access Your Member Discounts at OneFPA.org/MyDiscounts

- **Advicent Solutions:** 20% off financial planning software
- **Advizr:** Save 15% on a yearly subscription
- **Asset-Map:** Receive a 30-day free trial, case study and onboarding experience, plus \$10/month savings
- **BillFin by Redi2 Technologies:** One month free with annual subscription on cloud-based billing for RIAs
- **Black Diamond by SS&C Advent:** Save on the Black Diamond® wealth platform
- **Bloomberg Tax:** Save 20% on professional tax planning software
- **Clearnomics:** Save on Clearnomics Advisor Plan
- **College for Financial Planning:** 15% off CFP® Certification Education and Exam Prep, CE, Securities Licensing, Professional Development & Certificate Programs
- **Everplans:** Save 10% on Life and Legacy planning for your clients
- **FP Transitions:** Save \$200 on a Comprehensive Valuation Report **OR** 1 month EMS annual subscription fee waived
- **Golden Gate University:** 10% off Financial Planning Programs
- **LifeArcPlan™:** Get 50% off an Associate Level Subscription and a free, 30-day trial
- **Markel Cambridge Alliance:** 5% off RIA E&O coverage
- **MoneyGuidePro:** \$300 off annual price
- **Nest Egg Guru:** \$200 first-year subscription price
- **Orion Advisor Services:** New Orion clients and FPA members are eligible for a discount on per account fees
- **Redtail Technology:** Save \$9/month on CRM
- **RIA In A Box:** 1 free month of ongoing compliance service with new 1 year subscription
- **RightCapital:** Save 10% on interactive planning solutions
- **Ruby Receptionists:** Save on virtual receptionist services
- **Ryan Insurance Strategy Consultants:** Life, Disability and LTC Insurance for financial advisors and their clients
- **Tolerisk:** Save 10% on risk assessment technology for fiduciaries
- **True Profile:** Risk assessment platform for advisors and their clients
- **Twenty Over Ten:** Save on compliant website design and services
- **WealthConductor:** 10% off and a first month free trial
- **Yourefolio:** Save 20% off the subscription price

These offers are subject to change. Please visit OneFPA.org/MyDiscounts for the latest information.