

FINANCIAL PLANNING ASSOCIATION



TAKE 5

SEPTEMBER 2018

New FPA Knowledge Circle: CFP Board's Code of Ethics and Standards of Conduct

Join FPA's new Knowledge Circle on CFP Board's Code of Ethics and Standards of Conduct to discuss the impact the standards will have on your business, share best practices for adhering to them, and engage in meaningful conversations with CFP® professional peers on how to live into the new standards and identify ways CFP Board and FPA can best support you. Join the CFP Board's Code of Ethics and Standards of Conduct Knowledge Circle now.

Join us in the Windy City for the 2018 FPA Annual Conference

Source new ideas, gain fresh perspectives and develop your skills and talents at the 2018 FPA Annual Conference, to be held Oct. 3-5 in Chicago. Join thousands of financial planners from around the world to take part in unforgettable educational and networking activities, including one of our best general session line-ups yet. Registration closes Sept. 21. Don't delay, register now.

Special FPA Member Discount for 'Retirement Daily' from *TheStreet*

'Retirement Daily' helps financial advisers stay on top of the latest retirement-related news and information, as well as the newest investments for those who are planning for or living in retirement. Featured articles, written by advisers, examine advanced retirement strategies and tactics along with the latest retirement-related research — allowing you to stay current and knowledgeable about advancements in the marketplace. In addition, Retirement Daily's Q&A provides expert answers to your clients' most pressing questions. Sign up now.

Hip Hip Hooray: FPA Members Have Received 3,000 Media Queries!

FPA is proud to announce that CFP® professional members participating in FPA MediaSource have responded to more than 3,000 media inquiries since the launch of the program three years ago. FPA MediaSource connects FPA members with reporters covering personal finance and financial planning trends nationwide. Participating members gain valuable media exposure and credibility within the profession and the public. Eligible members who complete FPA media training can enroll. Sign up for media training today.

Receive a Free Cerulli Report and a Chance to Win a \$500 AMEX Gift Card

Cerulli Associates is asking for your feedback on emerging trends impacting the financial planning profession including client strategies, investor preferences and retirement perceptions and complexities. Take this <u>survey</u> by Sept. 30 to get one of these three reports for free – Stages and Ages, Protection Versus Performance or Retirement Investor - and a chance to win a \$500 gift card. Get started now.

Brought to you by...



RYAN INSURANCE
STRATEGY CONSULTANTS
"Protecting Your Financial Plans Since 1978"

An FPA Strategic Partner

Since 2009, FPA has partnered with Ryan Insurance Strategy Consultants to offer FPA members an industry-leading Long Term Disability plan, and recently launched a group voluntary Term Life plan. They also consult with advisory firms in making insurance product recommendations and their network of advisers are available to help solve more complicated insurance planning issues. Learn more at www.ryan-insurance.net.

Attention FPA Chapter Leaders: