FINANCIAL PLANNING ASSOCIATION

TAKE 5

OCTOBER 2018

The Fall Membership Drive is Underway!

The FPA Fall Membership Drive is underway, and you can help! From Oct. 1-31, when you refer a new CFP® Professional or Allied Professional member to FPA, you'll receive $50 off next year's dues and the professional you refer will receive $200 off their first year of membership dues. Your referral is the best compliment you can give FPA, and we are so thankful for your support! Refer a colleague today.

New Whitepaper on Communicating with Clients About Your Succession Plan

In 2018, FPA partnered with Janus Henderson Investors to conduct new research that went deeper on the issue of succession planning, examining what gets in the way of formal planning and how to take action. *Communicating with Your Team and Clients about Your Succession Plan*, the second of two whitepapers, explores why communication with clients and team members about your plans is critical and how to get started. Jump-start your succession planning by taking advantage of the research and whitepapers today.

Journal in the Round: Lessons Learned from the Past to Help Us Grow in the Future

Continuing the conversation that began at FPA Retreat 2018, Lew Walker, CFP® and Ben Coombs, CFP® are joined by next generation leaders Rachel Moran, CFP® and Alexandria Cole to share their very different career journeys and to connect their values, passion and vision for the future of the profession. This live rebroadcast will take place Oct. 31 at 2 p.m. ET. Register today.

Financial Planning Coalition Responds to SEC's Package of Rule Proposals

FPA submitted three comment letters through the Financial Planning Coalition to address the Securities and Exchange Commission's (SEC) proposed rule "Regulation Best Interest"; the proposed IA Interpretive Guidance; and the proposed Form CRS Relationship Summary. In the letters, the Coalition expressed its concerns and laid out recommendations to strengthen the proposed rules, including encouraging the SEC to extend the fiduciary obligation to all advisers. Learn more about the Coalition's comment letters.

Power up your business with the FPA Coaches Corner

Master the business of financial planning with the FPA Coaches Corner to reach new levels of productivity, profitability and success. Bringing together content from the best and brightest coaches in the profession, the FPA Coaches Corner is your one-stop-shop for tools and resources that will help you tackle necessary steps to realize your personal vision of success. Explore the resources and come back often as new content is being added.

Attention FPA Chapter Leaders:

Each month, FPA will provide you with a quick rundown of five news items worth sharing with chapter members at meetings, events and in newsletters. If you have any questions, please email Ben Lewis at BLewis@OneFPA.org or Ryanne Harrah at RHarrah@OneFPA.org.