

TAKE 5

AUGUST 2019



## Value of FPA Membership Shared in Latest Quarterly 'Snapshot'

FPA is pleased to share the second quarter 2019 'Snapshot' to help you stay informed of new FPA membership benefits and activities that support you and the financial planning profession. Each quarter, FPA reports on the most significant developments in member benefits and services in the areas of Advocacy, Business Support, Community and Professional Development. [Access the second quarter 2019 Snapshot now.](#)

## Advance Pricing for #FPAConf19 Ends Aug. 30!

Don't miss your chance to attend one of the year's top events—register for the 2019 FPA Annual Conference (October 16-18 | Minneapolis, Minn.) today to secure your savings on the conference rate. If you've already registered, book your lodging now, as space is filling up! [Register now.](#)

## A Deep Dive Into the SEC's 'Investment Advice Rule Package'

Get up to speed on the SEC's new 'Investment Advice Rule Package' from Kevin Walsh and David Levine from the Groom Law Group by viewing this [on-demand webinar](#). The first in a series of webinars FPA will host to educate FPA members on this rule package, this presentation covers Regulation Best Interest, Form CRS Relationship Summary and Form ADV Amendments, Commission Interpretation Standard of Conduct for Investment Advisers, and Commission Interpretation Broker-Dealer Exclusion. [View the recording now.](#) This on-demand webinar is only available to FPA members. Non-members can [join FPA](#) to gain immediate access to the recording.

### Introducing a New Group Health Plan Exclusively for FPA Members!

The FPA Group Health Plan, created and delivered in partnership with Ryan Insurance Strategy Consultants (RISC), is available exclusively to FPA members, and designed to meet your firm's health plan needs while minimizing costs. Plans are available in most states for groups of 2-50, with rates approximately 25% lower than comparable ACA plans. You can start saving now!

[LEARN MORE](#)

### FPA Member Benefit: Free Subscription to *Fortune* magazine

FPA is excited to announce that it partnered with *Fortune* magazine to provide members with a complimentary print subscription. This award-winning magazine provides unique perspectives on business and economic news, shares unrivaled access to business drivers and can serve as an inspiration for you to succeed in business and life. As an FPA member, you will receive a complimentary subscription (a \$29.98/year value).\* Enjoy another cost-saving benefit of FPA membership!

\*To cancel your complimentary *Fortune* magazine print subscription and all third-party mailings, [login](#) with your member credentials, and then check (or opt-out) "Offers that may be of interest to me".

### The \$68 Trillion Dollar Opportunity: New Research Report

FPA invites you to participate in a new, confidential [research study](#) by Cerulli Associates. For your participation, you'll receive a complimentary report based on key findings from Cerulli's latest research update. This report offers data-driven insights on the multigenerational wealth transfer including Cerulli's Wealth Transfer Model (sizing inherited assets by generation), most-effective methods to engage the next generation, and wealth transfer strategies and best practices. Take the [survey](#) now.

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