



TAKE 5

JULY 2018

PridePlanners and FPA integrate to support LGBTQ individuals and families

PridePlanners is integrating with FPA to enhance support to financial planners who serve the financial planning needs of LGBTQ Americans. A new FPA Knowledge Circle will be created to facilitate connections and provide professional development opportunities between former PridePlanners members and FPA members. PridePlanners will also continue to take part in FPA's Diversity Committee and members of the former PridePlanners, who are not yet members of FPA, will also get a discount off their first-year membership dues with the association. [Learn more.](#)

Lend your voice to new research on best practices in client understanding

FPA, Capital Preferences and T. Rowe Price have initiated new research that seeks to map the frontier of client understanding practices and answer key questions that are central to serving the needs of 21st-century investors. We want to hear from you! Take the [benchmarking survey](#) by July 25 and receive a customized report that will enable you to compare your individual client understanding practices to those of the greater advisory community.

Get media attention through FPA: Sign up for media training in 2018

FPA is hosting its next All-Member Virtual Media Training on Thursday, Aug. 16 from 4 – 5:30 p.m. ET. These complimentary trainings are open to all FPA members, and CFP® professional members who attend will qualify to take part in FPA MediaSource, allowing them to become visible for and respond to reporter queries. Augment your visibility with FPA! [Learn more](#) about how you can ace your next media interview and [sign up](#) for a training session today.

Are you ready to address the adviser succession challenge?

In 2015, only 28 percent of financial advisers had a formal succession plan. Three years later, little has changed. Discover why and learn how you can address succession planning obstacles by accessing [new research](#) and a new [whitepaper](#) from FPA and Janus Henderson Investors. You can also learn more by viewing the [Advisers are Failing to Plan for the Inevitable](#) on-demand webinar. Jump-start your succession planning process by taking advantage of these FPA resources today.

FPA Coaches Corner Spotlight: Compliance considerations in joining or leaving an RIA

Join John T. Carr, principal at Carr Butterfield Attorneys at Law, and Todd Sakoda at the Consortium/Lift Burden for an interactive, 60-minute virtual session on July 31 at 4 p.m. ET to learn about the fundamental issues that everyone, especially younger professionals, should be aware of when changing jobs. You will learn about employment contracts, non-compete clauses, non-solicitation agreements, client “ownership” and more. You can [submit questions](#) in advance or come armed with them! [Register now.](#)

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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:

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.