








## Get to Know Your FPA


Rely on FPA as your expert resource for what you need to thrive professionally. Here's how FPA membership provides the benefits and resources you need to succeed.

PROFESSIONAL DEVELOPMENT Elevate Your Knowledge		MEMBER BENEFIT	MEMBER SAVINGS
<i>Journal of Financial Planning</i>	Receive digital and hard copy editions of FPA's award-winning, peer-reviewed <i>Journal</i> for the best current thinking, innovative, thought-provoking content, ideas and strategies plus continuing education credit with access to searchable archives. Download editions with the JFP app.		\$119
<b>Professional Development Center</b> 	Learn your way through this portal to all educational resources and continuous learning opportunities that FPA has to offer, including online learning activities, live events, career development opportunities and peer-to-peer knowledge exchange forums.	✓	
<b>FPA Webinars</b>	Increase your skillset and earn continuing education credit through live and on-demand, high-quality webinars. CFP® Professional category members receive 6 FREE webinars of their choice annually.		50%
<b>FPA Annual Conference - BE</b>	Attend this redesigned, reinvigorating largest gathering of CFP® professionals and take home practical knowledge and strategies for immediate implementation in your practice.		\$200
<b>FPA Retreat</b>	Recharge and relax at this FPA tradition delivering an in-depth learning experience like no other. By gathering the top leaders, thinkers and planners, ideas emerge with the potential to alter the course of your career and the profession.		\$100
<b>FPA SmartBrief</b>	Subscribe to this weekly digest of the latest in the profession, including news, policy updates and the trends in practice management.		
<i>Financial Services Review</i> 	Access the latest in theoretical and empirical research in personal financial management, including benefits and retirement planning, estate planning, investments, insurance, real estate, international investing, investor psychology and more through this quarterly supplement from the Academy of Financial Services and the <i>Journal of Financial Planning</i> .	✓	
<b>FPA Residency</b>	Jump start your career in this experiential 6-day in-residence program. If you are eligible to sit for the CFP® Certification Examination, are a new or soon-to-be CFP® professional, you can build experience in real financial planning scenarios and establish mentor relationships with preeminent thought leaders.		\$500- \$600

COMMUNITY Expand Your Connections		MEMBER BENEFIT	MEMBER SAVINGS
<b>FPA NENY</b>	Expand your connections through FPA's unparalleled nationwide chapters. Network and share ideas with colleagues in your area, attend local educational programs and events, and participate in leadership opportunities.	✓	
<b>FPA Connect</b>	Interact virtually with peers through FPA Connect. FPA Connect's mobile app and mobile-enabled website (Connect.FPAnet.org), helps you stay plugged into conversations of interest through forums focused on a variety of topics and best practices.	✓	
<b>FPA Knowledge Circles</b> 	Learn from your colleagues through hosted areas that gather FPA members with similar interests for best practice conversations. Discussions take place online, over the phone, and in-person.	✓	
<b>Volunteer</b>	Contribute to the success of your profession. FPA's volunteer structure enables members to contribute to the profession in meaningful ways that fit their life/business at the national or chapter level. Whether it's a short, one-time commitment, or a long-term project/position – FPA welcomes the skills, talents and passions of all members.	✓	



BUSINESS SUCCESS Energize and Grow Your Business		MEMBER BENEFIT	MEMBER SAVINGS
<b>FPA PlannerSearch®</b>	Connect with consumers in your area through this online search tool where consumers can search for CFP® professionals. FPA members with listings additionally receive four client articles for your practice to use in newsletters, promotions and on your website. (Eligibility requirements apply).	✓	
<b>FPA Member Advantage Program</b> 	Access a comprehensive collection of member-only discounts on industry-leading consultants, top-notch education providers, first-class insurance plans, and best-of-breed software and technology from firms selected to help you take your practice to the next level. Savings on these essential business tools and resources can more than cover the cost of your annual dues.	✓	
<b>FPA Research &amp; Practice Institute™ (RPI)</b> 	Gain a competitive advantage through original research on business-centric topics and issues, including operations, personnel, human resources, marketing and technology. Detailed analysis, reports, whitepapers and resources, based on the research, will help you identify your business gaps and address them.		
<b>FPA Practice Management Blog</b>	Run your business more efficiently, effectively and profitably with the latest insights and strategies from CFP® professionals and practice management experts at the revamped FPA Practice Management Blog.	✓	
<b>FPA Job Board</b>	Explore career opportunities through confidential online resume posting, automated weekly e-mail notification of new job listings and the ability to save jobs for later review. Employers and recruiters can search a large pool of applicants through targeted access to the nation's most qualified financial planning talent pool.	✓	
<b>Media Training</b> 	Receive media training through your local FPA chapter or participate in organization-wide virtual trainings. Learn the essentials of working with journalists including how to pitch story ideas to reporters, what you need to do to prepare for interviews, how you can improve interview performance and tactics for ensuring you maintain a great reputation with reporters.	✓	
<b>FPA Media Query System</b> 	Be a part of FPA's unique media query system for CFP® professionals that connects journalists with FPA members on personal finance and financial planning stories. Queries are sent electronically to qualified CFP® professional members who attend an FPA-approved media training.	✓	
<b>FPA MentorMatch</b>	Connect with experienced FPA members to receive best practices and tips from the experts, or volunteer to help share your expertise with others. This FPA program is designed to connect emerging leaders with seasoned professionals to foster professional development while giving back to the profession.	✓	
<b>Magazine Subscriptions</b>	Keep current with a monthly subscription to <i>Money</i> magazine plus access to the <i>Money</i> digital edition and a weekly subscription to <i>Bloomberg BusinessWeek</i> magazine with access to the iPad app.	✓	

ADVOCACY Protect Your Business		MEMBER BENEFIT	MEMBER SAVINGS
<b>State Advocacy Toolkit</b>	Jumpstart your advocacy efforts with tools that include comprehensive, downloadable documents that prepare you for advocacy activities with your state legislators.	✓	
<b>Advocacy Days</b> 	FPA Advocacy Days in Washington, D.C. and State Advocacy Days provide you with hands-on training, branded folders, badges and position leave behinds, a pre-event webinar, and the option of an advocacy team member to lead you through your first effort.	✓	
<b>Financial Planning Coalition</b>	FPA's role in the Financial Planning Coalition provides you with a powerful voice in Washington D.C. on joint policy positions and gives more direct access to policymakers on behalf of FPA members. Research and data driven projects help persuade public policy decisions on issues that advance your profession.	✓	
<b>FPA Political Action Committee (FPA-PAC)</b>	Representing financial planners and issues affecting you is the primary objective of the FPA-PAC - the only registered PAC on Capitol Hill representing the interests of the financial planning profession. FPA-PAC builds valuable relationships with candidates, provides extra access to leaders who share your concerns on major issues that affect financial planners and financial planning and helps educate policymakers about the financial planning profession.	✓	

## Not an FPA Member?

Join your professional community at [OneFPA.org](http://OneFPA.org), call 800.322.4237 x. 2  
or contact your FPA Chapter at <insert chapter website> , <insert chapter phone number>.