



Take 5

July 2020

FPA Launches New Learning Center

To provide cutting-edge and easily-accessible programming to those in the financial planning community, FPA launched a new Learning Center in partnership with CommPartners on June 20. The new Learning Center features a simplified single sign-on (SSO) for users, 150+ on-demand webinars (with more than half offering continuing education credit), and easy access to *Journal of Financial Planning* and *Financial Services Review* exams. Registrants can also identify courses of interest, including the level of complexity, specific financial planning modules, and more. Live, online courses have resumed and FPA members will soon be able to access a comprehensive learning transcript that captures all their FPA learning experiences, including completed courses and conference sessions. [View and register for courses](#) today as you continue to pursue mastery in financial planning.

What are Your Peers Learning This Month?

Dive deeper into this month's *Journal of Financial Planning* to discover strategies and resources for addressing systemic racism in the profession by creating inclusivity, preparing for prospective clients' questions, and making a difference. Additionally, Robert B. Mauterstock Jr., CFP®, CLU®, ChFC, CLTC will address the concerns of aging Baby Boomers and offer suggestions for financial planners to change from being asset managers to lifestyle managers. Thank you to American Advisors Group for powering this month's *Journal of Financial Planning*. [Check out the July issue.](#)

New Research: Financial Advisers Feeling Bearish for the Next Six Months

FPA, the *Journal of Financial Planning* and Janus Henderson Investors released the 2020 Trends In Investing Survey that shows where financial advisers are investing today and where they plan to invest in the coming year. The survey also reveals how financial planners are feeling about the pandemic and their outlook for the economy, insights from your peers on investment trends, and more. [Download the 2020 Trends in Investing Survey report now.](#)

Support the Advancement of the Financial Planning Profession

The FPA Political Action Committee (PAC) is the only registered PAC to support federal candidates representing the interests of the financial planning profession. The PAC allows us to support candidates for Congress who will make supporting the financial planning profession and financial planners a priority. To help us fight for our profession, we ask you to [make a contribution](#) to support your FPA PAC. Whether you contribute \$50 or \$5,000, every dollar is appreciated and will support our efforts in elevating the profession.

New to the Profession? Check Out the FPA Next Generation Planner

In this month's *FPA Next Generation Planner*, learn from Cameo Roberson, AAMS®, about how you can use volunteering to build your professional brand. Also, get tips from your peers on how best to communicate your value to clients and potential clients and why past financial crises made Karma Forrestal, CFP®, a better financial planner. Thank you to TD Ameritrade Institutional and Ryan Insurance Strategy Consultants for powering the *FPA Next Generation Planner*. [View the July issue.](#)

The YAFPNW Giving Back Panel

In a recent episode of the "You're a Financial Planner...Now What?" podcast, Hannah Moore, CFP® hosts a "giving back" panel with FPA Pro Bono Director Kurt Kaczor; Robinson Crawford, CFP®; FPA of Georgia NexGen Director Alex Wilson, CFP®; and Kyle Eaton, CFP®. Thank you to Finance of America Reverse for powering this podcast episode. [Tune into this episode](#) to learn more about how these individuals got involved in pro bono work, what it has taught them and how those looking to give back can get started.

Take 5 is Brought to You by Ryan Insurance Strategy Consultants

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.



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