



## Practice Management Resources

Provided to enhance your business and increase your bottom line



The Financial Planning Association® (FPA®) offers members discounted rates on a variety of products and services that are essential to operating a financial planning practice. This guide incorporates exclusive FPA programs and member-only discounts on some of the best product, service and solution providers. These select partnerships have been reviewed to ensure they meet FPA's Standard of Care and are offered exclusively to FPA members and their firms.

### FPA's Practitioner Resource Program core business areas:

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### FPA's Practitioner Resource Program core business areas:

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Each of our partnering companies within the FPA Practitioners Resource Platform have been selected and reviewed to ensure they meet standards of quality and provide value for our members.

- > FPA has more resource partners coming soon. Visit [www.FPAnet.org/PRG](http://www.FPAnet.org/PRG) to learn more about any of these offers, or to start your partnership with FPA.
- > As this is a developing program, please tell us what you need to succeed at: [www.fpanet.org/professionals/Membership/DiscountPrograms/PRG](http://www.fpanet.org/professionals/Membership/DiscountPrograms/PRG).

# Grow My Practice

## **FPA Client Connect, (powered by Liberty Publishing)**

800-322-4237 | [www.fpanet.org/professionals/Membership/DiscountPrograms](http://www.fpanet.org/professionals/Membership/DiscountPrograms)

FPA Client Connect takes marketing your practice to a whole new level. In addition to having a wide range of personalized financial email communication pieces such as articles, newsletters, reports, ebrochures, and quick notes, FPA Client Connect users will be able to launch email campaigns with Set-It-and-Forget-It (SIFI) technology. One or two clicks and you're done! FPA Client Connect is the value-added technology benefit you get from FPA membership.

## **FPA PlannerSearch**

800-322-4237 | [www.fpanet.org/professionals/Membership/PlannerSearch](http://www.fpanet.org/professionals/Membership/PlannerSearch)

Get financial planning leads from our online tool to help consumers find financial planners who are current members of FPA in good standing; a CERTIFIED FINANCIAL PLANNER™ professional, adhering to FPA's Code of Ethics and abiding by the FPA Standard of Care.

## **FPA Practice Match (powered by RIA Match)**

800-322-4237 | [www.fpanet.org/professionals/Membership/DiscountPrograms](http://www.fpanet.org/professionals/Membership/DiscountPrograms)

Financial planners and advisers looking to partner or further their succession plan can do so anonymously and securely via FPA Practice Match. FPA Practice Match is designed to create an efficient market for advisors and planners regardless of scale, scope or experience. FPA Practice Match is the succession planning and growth tool to help you manage your future.

## **AdvicelQ**

212-257-8000 | [www.adviceiq.com](http://www.adviceiq.com)

AdvicelQ is a digital branding tool that provides advisers with significant web exposure to local prospects. AdvicelQ is the first local digital branding product for advisers, comprising of an online directory of trusted advisers and publishing platform of financial content, designed for consumers who want to better understand and leverage the services of a financial adviser.

**Members receive a 15% discount on this very unique and powerful tool.**

## **FiPath**

888-552-7185 | [www.fipath.com](http://www.fipath.com)

FiPath makes it easy and affordable to acquire clients through their automated referral platform, connection to the consumer community and on-line marketing best practices.

**Learn more and sign up through FPA to receive a 20% discount.**

## **Omyen**

781-366-0063 | [www.omyen.com](http://www.omyen.com)

Omyen helps advisers effectively acquire targeted clients and efficiently create actionable financial plans. Omyen's unique products include the Wealth Planner for client centric financial planning featuring the industry's first retiree healthcare planning capability, the Personal Financial Index for client education/acquisition, and the Retirement Savings Planner for advisers working with retirement plans. **FPA members save 20% on the purchase and renewal of all Omyen technologies.**



Growth

*“How Can FPA Help Me Grow My Business?”*

# Grow My Practice

## **Peak Advisor Alliance**

800-514-9116 | [www.peakadvisoralliance.com](http://www.peakadvisoralliance.com)

Known as the “Advisor’s Advisor,” Peak Advisor Alliance is the country’s largest financial adviser coaching and practice management company. Headed by Ron Carson, CFP®, the country’s #1 independent financial adviser, according to *Registered Rep* magazine, a Top 10 Barron’s adviser and a top financial adviser coach, Peak Advisor Alliance provides expert financial adviser coaching, timely content and a friendly community to help financial advisers reach their peak of business and life success. More than 20% of the top 100 independent financial advisers in the country trace their roots as a Peak Advisor Alliance member, according to *Registered Rep* magazine. **FPA members receive a \$595 discount on the initiation fee and a 40% discount on the monthly subscription fee.**

## **Protected Tomorrows**

847-522-8086 | [www.protectedtomorrows.com](http://www.protectedtomorrows.com)

Protected Tomorrows is an international advocacy firm headquartered in the Chicago area that enhances the lives of people with special needs by providing training programs to professionals who work with families with disabilities. Protected Tomorrows helps financial professionals manage business risks, assist in practice growth and deepen relationships with clients who have a loved one with a disability through its expertise and educational resources. **FPA members receive a 15% discount to Protected Tomorrows Professional Membership Program as well as all products and services.**

## **Veralytic**

813-908-8242 | [www.veralytic.com](http://www.veralytic.com)

Veralytic is a leading innovator in life insurance research. The Veralytic Report is the only patented, objective and transparent evaluation of suitability of life insurance. Veralytic provides objective innovative research solutions to help advisors reduce costs and risk, improve consistency, and document due diligence processes against possible lawsuits and regulatory requirements. **FPA members receive a \$25 discount (an annual savings of \$300) on the monthly single-user subscription fee.**

# Increase My Efficiency

## **ATBS**

888-640-4829 | [www.atbsshow.com](http://www.atbsshow.com)

ATBS is the largest business services provider in the U.S. dedicated to servicing small businesses and independent contractors. They provide a full spectrum of back office management tools including bookkeeping and accounting, taxes, payroll, online financial statements, cloud receipt archive for anytime, anywhere access, as well as unlimited business consulting. Their affordable back office solutions give financial advisers more time to prospect for new clients and service existing clients. **FPA Members receive discounts of up to 8% on ATBS products.**

## **Copytalk**

941-894-0007 | [www.copytalk.com](http://www.copytalk.com)

Copytalk is the leading voice-to-text provider in the industry. Thousands of producers have chosen Copytalk to capture meeting notes, recommendations, etc. Dial Copytalk, dictate anything you'd like. Within a few hours the text is emailed securely. Simply put: You Talk, We Type. Copytalk, the compliance tool that pays for itself. **FPA members receive a \$10 discount on the monthly service fee.**

## **Fiserv**

800-872-7882 | [www.fiserv.com](http://www.fiserv.com)

Fiserv Financial Advice Management technology reflects a deep understanding of the needs of wealth management institutions, their clients and the future direction of the advice industry. The only provider to offer a true end-to-end solution, Fiserv offers comprehensive financial planning, actionable investment proposal tools and retirement needs analysis technology. **FPA members receive an exclusive 20% discount on purchase or renewal of Financial Advice Management solutions from Fiserv.**

## **fi360**

866-390-5080 | [www.fi360.com](http://www.fi360.com)

fi360 is the recognized expert on investment fiduciary responsibility and offers advisors and institutions comprehensive fiduciary education and technology solutions that comply with the industry-recognized *Prudent Practices for Investment Fiduciaries*, the cornerstone of a prudent investment process.

The **fi360 Toolkit for Advisors** is a powerful, web-based analytical and reporting software solution. With more than 20 different areas of functionality, it helps you to deliver fiduciary-quality asset allocation, portfolio construction, and performance reporting services to your clients. The Toolkit's powerful investment research capabilities incorporate Morningstar data to deliver detailed performance information on every option in a client's lineup. This includes the proprietary fi360 Fiduciary Score<sup>®</sup> that rates an investment's appropriateness as a prudent selection. **FPA members can receive a free 30-day trial.**

# Increase My Efficiency

## **Omyen**

781-366-0063 | [www.omyen.com](http://www.omyen.com)

Omyen's financial planning technologies help financial advisers effectively develop client-centric financial plans. Omyen's unique products include the Wealth Planner for client centric financial planning featuring the industry's first retiree healthcare planning capability, the Personal Financial Index for client education/acquisition and the Retirement Savings Planner for retirement planning. **FPA members save 20% on the purchase and renewal of all Omyen technologies.** Multi-product discounts are available.

## **Veralytic, Inc**

813-908-8242 | [www.veralytic.com](http://www.veralytic.com)

Veralytic is a leading innovator in life insurance analytics. The Veralytic Report is the only patented, objective and transparent evaluation of suitability of life insurance. Veralytic provides objective innovative research solutions to help advisers reduce costs and risk, improve consistency, and document due diligence processes against possible lawsuits and regulatory requirements. **FPA members receive at \$25 discount on the monthly subscription fee.**

## **Zywave**

414-454-6100 | [www.zywave.com](http://www.zywave.com)

Zywave delivers technology solutions for financial services firms to achieve organic growth. The software suite, including Profiles, NaviPlan and other marketing tools, delivers strategic solutions for everything from point-of-sale planning to complex analyses. **FPA members save 20% on the purchase or renewal of a NaviPlan or Profiles subscription.**

*“What Resources are Available to My Firm  
to Manage My Risk?”*

# Manage My Risk

## **GEICO - Home and Office Liability Insurance**

800-861-8380 | [www.geico.com](http://www.geico.com)

GEICO has been offering auto insurance since 1936 and is the third largest private passenger carrier in the United States. FPA has teamed up with GEICO to provide you the benefit of great rates on auto insurance. **In addition to the membership discount of up to 8%** you also receive 24-hour service online or by phone and efficient claim handling.

## **IPS AdvisorPro®**

305-670-4440 | [www.ipsadvisorpro.com](http://www.ipsadvisorpro.com)

Created by advisers, for advisers, this award-winning web-based system helps advisers build fully customized Investment Policy Statements (IPS) quickly and easily. **FPA members can take advantage of a discounted rate on their first year’s subscription.**

## **LifeLock Identity Theft Protection Program**

800-543-3562 | [www.lifelock.com](http://www.lifelock.com)

Every three seconds another identity is stolen. Protect your identity with LifeLock, the leader in identity theft protection. **Get 30 days free and 10% off.**

## **Markel Cambridge Alliance**

800-691-1515 | [www.markelcambridge.com](http://www.markelcambridge.com)

The E&O program provided through Markel Cambridge Alliance for Registered Investment Advisers (RIA) and independent Investment Advisory Representatives (IAR) offers stability, quality of coverage and excellent customer service **at a discount to FPA members.** Markel Cambridge Alliance has been a long-term partner with FPA and has provided this coverage since 1988.

## **MetLife Auto & Home®**

877-491-5089 | [www.MetLife.com](http://www.MetLife.com)

As a member of the Financial Planning Association you have access to valuable features and benefits, including special group discounts on auto insurance. Plus, if you decide to choose MetLife Auto & Home, the switch will be made quickly and easily. Learn more about the benefits of your auto insurance program from MetLife Auto & Home®. Call today for a free quote at 1-877-491-5089!

MetLife Auto & Home is a brand of Metropolitan Property and Casualty Insurance Company and its affiliates: Metropolitan Casualty Insurance Company, Metropolitan Direct Property and Casualty Insurance Company (CA Certificate of Authority: 6730, Warwick, RI), Metropolitan General Insurance Company, Metropolitan Group Property and Casualty Insurance Company (CA COA: 6393; Warwick, RI) and Metropolitan Lloyds Insurance Company of Texas, all with administrative home offices at 700 Quaker Lane, Warwick, RI 02886. Coverage, rates and discounts are available in most states to those who qualify. 1101-0071 © 2011 MetLife Auto & Home L0811200270[exp0714][All States]

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to Manage My Risk?”*

# Manage My Risk

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**FPA members receive a 15% discount to Protected Tomorrows Professional Membership Program** as well as all products and services.

## **Ryan Insurance Strategy Consultants - Long-term Disability**

800-796-0909 | [www.Ryan-Insurance.net](http://www.Ryan-Insurance.net)

Ryan Insurance Strategy Consultants specialize in assisting Fee-Only advisers with the evaluation and recommendation of life insurance, disability insurance and long term care insurance for their clients. The administrators for the FPA Long-term Disability Group Plan, the new **FPA group disability plan is 50% less expensive** than individual policies with similar features and is available exclusively to FPA members.

# Manage My Employees

## **FPA Compensation Study**

800-322-4237 | [www.FPAnet.org/SalarySurvey](http://www.FPAnet.org/SalarySurvey)

FPA has released another groundbreaking *Financial Planning Compensation Report* with compensation, incentive and benefit data for financial planners, technical specialists and support staff.

Discover Key Information about:

- Average salaries, bonuses and incentives in your region
- Compensation by various firm and individual characteristics
- Benefits that include how many practices provide specific incentives
- The amount and type of time off typical employers provide
- And more!

Unlike other salary surveys, the 2012-2013 *Financial Planning Compensation Report* breaks information down by firm size, region, job position and more!

# Expand My Knowledge

## fi360

866-390-5080 | [www.fi360.com](http://www.fi360.com)

FPA and fi360 have partnered to bring you *Fiduciary Implications of Financial Planning*, an eight-part program that will enhance your understanding of your fiduciary responsibility. The web-based educational course covers the fundamentals of the fiduciary standard of care, and how they apply to the financial planning process. This unique certificate program covers a variety of fiduciary-related topics and provides over 10 hours of CFP® continuing education credit, including an ethics component! **FPA members receive \$250 off the online format of The Fiduciary Implications of Financial Planning.**

## FPA Practice Management Center

800-322-4237 | [www.fpanet.org/professionals/PracticeManagementCenter](http://www.fpanet.org/professionals/PracticeManagementCenter)

The FPA Practice Management Center provides you with articles, webinars, archived conference sessions, toolkits, as well as tools and templates to meet your practice management needs. Regardless of whether you are new to the profession or envisioning your succession plan, FPA has the support you need.

## The FPA Virtual Learning Center

800-322-4237 | [www.fpanet.org/professionals/Learn/VirtualLearningCenter](http://www.fpanet.org/professionals/Learn/VirtualLearningCenter)

FPA's Virtual Learning Center (VLC) webinar library is one of our most popular tools for financial planners. Webinars are one-hour education sessions that are also achieved for on-demand learning convenience. Some webinars provide CFP® continuing education credits.

## The FPA White Paper Library

800-322-4237 | [www.fpanet.org/professionals/PracticeManagementCenter](http://www.fpanet.org/professionals/PracticeManagementCenter)

Need to learn more about an industry trend or issue, solve a problem, or make a decision, access FPA's White Paper Library to learn more about a variety of topics from economics, retirement and income planning to best practices for marketing and sales.

## The College for Financial Planning

800-237-9990, Option 2 | [www.cffpinfo.com](http://www.cffpinfo.com)

The College for Financial Planning's purpose is to formalize financial planning, set high standards, and establish a rigorous certification process for financial services professionals. In 1972, the College for Financial Planning introduced the CERTIFIED FINANCIAL PLANNER™ certification. CFP® certification has evolved into the world's most recognized and respected financial planning credential, with over 67,000 professionals in the United States having earned the designation. **As a member of FPA, you have access to discounts on superior educational programs,** through The College for Financial Planning.

## The Dalton Review

877-426-2373 | [www.thedaltonreview.com](http://www.thedaltonreview.com)

Dalton Education provides **FPA members significant discounts** on their CFP® review programs. The Dalton Review® for the CFP® Certification Examination is the leading review provider in the country, with pass rates consistently 70-80% on the exam.

**InFRE® Retirement Resource Center (IRRC)**

847-756-7350 | [www.infre.org](http://www.infre.org)

Retirement planning is an integral part of financial planning and, as such, FPA has formed a strategic alliance with the International Foundation for Retirement Education (InFRE®) and the InFRE® Retirement Resource Center. The purpose of this alliance is to provide FPA members, many of whom are already CFP® professionals, with **discounted access to educational offerings** that allow planners to further study the growing complexities of retirement planning, income and design.

**Keir Education**

800-795-5347 | [www.KeirSuccess.com](http://www.KeirSuccess.com)

Keir educational resources provides exam preparation materials and classes to individuals seeking a professional license, designation or certification in the financial services industry. Keir can help with: pre-licensing for life, accident & health and/or property & casualty; securities licensing for over 18 different exams (including Series 6, 7, 63, 65 and 66); professional designation for CLU®, ChFC®, CPCU® and CFP® Certification; and continuing education. When it comes to exam preparation, Keir delivers the expert resources and proven support that will improve the study experience and maximize the results. **FPA members receive a 20% discount on review materials, two free diagnostic exams for the CFP® certification exam and access to examination readiness assessments.**

**Peak Advisor Alliance**

800-514-9116 | [www.peakadvisoralliance.com](http://www.peakadvisoralliance.com)

Known as the “Advisor’s Advisor,” Peak Advisor Alliance is the country’s largest financial adviser coaching and practice management company. Headed by Ron Carson, CFP®, the country’s #1 independent financial adviser, according to *Registered Rep* magazine, a Top 10 Barron’s adviser and a top financial adviser coach, Peak Advisor Alliance provides expert financial adviser coaching, timely content and a friendly community to help financial advisers reach their peak of business and life success. More than 20% of the top 100 independent financial advisers in the country trace their roots as a Peak Advisor Alliance member, according to *Registered Rep* magazine. **FPA members receive a \$595 discount on the initiation fee and a 40% discount on the monthly subscription fee.**

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# Exceed My Client Expectations

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**FPA Virtual Meeting (powered by AnyMeeting)**

800-322-4237 | [www.FPAnet.org/professionals/Membership/DiscountPrograms](http://www.FPAnet.org/professionals/Membership/DiscountPrograms)

This full-featured, easy-to-use web conferencing product is ideal for financial planning professionals, looking to connect to their clients in a cost effective way. It features six-way video conferencing, conference calling, built-in VoIP, screen sharing, application sharing, recording and more! FPA Virtual Meeting helps you connect and stay in touch with your most important clients.

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**Business  
Continuity**

*How Can FPA Help Me Plan the Future of My Practice?*

# Plan My Future

**FPA Practice Match (powered by RIA Match)**

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## Office Support

### *What Services are Available to Support My Practice?*

# Support My Practice

#### **FedEx®**

800-463-3339 | [www.fedex.com](http://www.fedex.com)

FPA and FedEx are working together to bring you special FedEx discounts. **Save up to 21%** on select FedEx shipping services and up to 15% on select FedEx Office services — no enrollment fees.

#### **SmartXpress Office Supplies**

877-223-3802 | [www.smartxpress.com](http://www.smartxpress.com)

SmartXpress is the smart alternative to shopping retail. **Members can take advantage of 40,000 business products with discounts of up to 70%.** Orders over \$50 ship same day with free next-day delivery from 31 distribution centers. New customers receive an additional 25% off their first order of \$100 or more.

#### **Vacation Center**

888-466-2849 | [www.FPAvacations.com](http://www.FPAvacations.com)

Explore the world at discount prices and receive an **exclusive FPA member discount** at the Vacation Center.

#### **Wireless Center**

866-825-5460 | [www.FPAwireless.com](http://www.FPAwireless.com)

Save time and money at the FPA Member Advantage Wireless Center. Compare and purchase plans and phones from all major carriers and brands.



