



About FPA

The Financial Planning Association® (FPA®) is the largest membership organization for CFP® professionals in the U.S. and also includes those who support the financial planning process. Working in alliance with academic leaders, legislative and regulatory bodies, financial services firms and consumer interest organizations, FPA helps connect all in our membership through a variety of unique and compelling ways.

FPA members adhere to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve. FPA membership consists of CERTIFIED FINANCIAL PLANNERS™, educators, financial services professionals, students and more; the organization is compensation neutral and represents those from diverse backgrounds and business models. FPA's unparalleled network of chapters encourage professional development and networking on a local level through a nationwide network of nearly 100 chapters.

FPA Leadership

- Lauren M. Schadle, CAE –Executive Director/CEO
- Michael A. Branham, CFP® – 2013 President
- Paul H. Auslander, CFP® – 2013 Chair
- Janet A. Stanzak, CFP® – 2013 President-elect

Headquarters

7535 E. Hampden Ave., #600
Denver, CO 80231
Phone: 800.322.4237

Websites / Online

- General: www.FPAnet.org/Professionals
- *Journal of Financial Planning*: www.FPAnet.org/Journal
- Social Networking: www.FPAnet.org/Social
- FPA Connect: <http://connect.FPAnet.org>

Conferences

Registration to these FPA events is complimentary for full-time journalists

- **FPA Retreat:** May 4-6, 2013 in Palm Springs, Calif.
- **FPA Experience:** October 19-21, 2013, Orlando, Fla.

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FPA Resources for Journalists

- Online Press Room: www.FPAnet.org/PressRoom
- FPA members serve as expert sources on a variety of topics such as retirement planning, small business planning, family and marriage planning, and can also speak to client issues in a particular profession, or with different income and asset levels.
 - Contact PR@FPAnet.org to connect to a source.
- Publications and research:
 - FPA's award-winning *Journal of Financial Planning* features prominent writers and stories that enhance the knowledge and understanding of the evolving technical aspects of financial planning.
 - Grow your business with FPA's online **Practice Management Center**. Find the latest on office software, gain insight on marketing techniques, search human resources best practices or even changes to compliance. It's all here and even more: information on operations, building client skills and links to content from the leading experts of the day.
 - FPA's highly regarded Research Center conducts research to empower the financial services sector with knowledge and an understanding of the financial planning process, including how it affects consumers, planners and firms. www.FPAnet.org/professionals/Learn/ResearchCenter/
 - FPA Press publishes some of the profession's most well-known titles, resource guides, handbooks, research studies and advice, including:
 - *Financial Intelligence: How to Make Smart, Values-Based Decisions with Your Money and Your Life*, by Doug Lennick, CFP®
 - *Conserving Client Portfolios During Retirement*, by Bill Bengen, CFP®
 - *Lighting the Torch: The Kinder Method™ of Life Planning*, by George Kinder, CFP® and Susan Galvan
 - *Oversold and Underserved*, by Marc S. Freedman, CFP®
 - *Financial Planning—The Next Step*, by Roy T. Diliberto, CFP®

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FPA for Members

Chapters:

With a network of nearly 100 chapters nationwide, thousands of CFP® professionals and members at large have access to local opportunities such as:

- Continuing education and networking opportunities with professionals in their area;
- Study groups for those who are new to the profession and mentoring opportunities for experienced professionals; and
- Extensive tools, training, leadership, practice management and educational resources.

Resources:

- FPA's Member Discount Program is a comprehensive collection of products and services available at exclusive member-only rates. This program supports and enhances member's independent financial planning practices within five core areas:
 - Back-Office Support, Education & Training, Marketing, Insurance, and Technology
- The FPA Practice Management Center (www.FPAnet.org/Professionals/PracticeManagement) is a hub of tools and resources to help professionals start, grow or leave their financial planning practice.
- The Virtual Learning Center provides learning opportunities through live audio and Web-based presentations; allows members to ask questions of expert speakers; and earn continuing education (CE) credit.
- FPA hosts a series of conferences throughout the year that provide attendees opportunities to earn CE credit and network with like-minded professionals. FPA conferences include:
 - FPA Business Solutions – The highly regarded advanced practice management conference for financial planners. www.FPASolutions.org
 - FPA Retreat – An opportunity to delve into the depths of financial planning and have discussions which challenge deeper thinking and help set the direction of the profession. www.FPARetreat.org
 - FPA Experience – The largest annual gathering of the financial planning community. www.FPAAnnualConference.org

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FPA Advocacy and Legislative Efforts:

FPA is a leading voice on issues related to financial planning among legislators and regulators. Its efforts focus on highlighting the importance of competent and ethical financial planners in the delivery of financial services to consumers using the highest standards of professional conduct. FPA engages with federal and state regulators and legislators to advocate for policies to benefit consumers and financial planning practitioners.

FPA's current advocacy priorities are focused on:

- **Fiduciary standard** – Support SEC rulemaking that would ensure that broker-dealers put customer's interests first when they are giving personalized investment advice to retail customers.
- **Appropriate oversight of investment advisers** – Support more robust oversight of investment advisers by directing sufficient resources to improve current oversight programs.
- **Appropriate regulation of financial planners** – Educate policymakers about the practice and the value of financial planning and the effect of policy decisions on practitioners and their clients.

In addition to its ongoing legislative and advocacy efforts, FPA participates in the Financial Planning Coalition (www.FinancialPlanningCoalition.com) with key partners to advise legislators and regulators and inform their decisions.

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FPA for the Consumer

FPA believes it is in the public's best interest to understand the value of financial planning and the services they receive from CERTIFIED FINANCIAL PLANNER™ professionals. We advocate for complete transparency, clearly understood information and high standards of conduct for anyone offering financial planning. FPA requires all of its members to adhere to a Code of Ethics and deliver financial planning services in accordance with the FPA Standard of Care.

FPA's consumer website, www.FPAnet.org, offers a variety of free, online educational tools and resources and to help individuals learn more about financial planning, including information about reaching their financial goals or recovering from unexpected setbacks.

- **Life Goals planning resources are available for:** Saving for Retirement; Saving for College; Buying a Home; Getting Married; Starting a Family; Starting a New Job; Serving in the Military; Estate Planning; and Saving on Taxes.
- **Life Crises planning resources are available for:** Losing a Home; Losing a Job; Getting a Divorce; Caring for a Loved One; Filing for Bankruptcy; Preparing for Disaster; Stolen Identity; and Credit Repair.

When consumers are ready to engage a planner, they can do so through our premier CFP® practitioner search service, **FPA PlannerSearch®**. FPA PlannerSearch (www.PlannerSearch.org) connects individuals with FPA's financial planning experts, all who abide by FPA's Code of Ethics and Standard of Care. This program is unique as it allows individuals to search by popular search options including:

- How planners charge, including fee-only and other compensation methods
- CFP® practitioners who offer free, initial consultations
- CFP® practitioners who specialize in specific areas ranging from budgeting to retirement planning.

FPA Community Outreach programs organized by FPA chapters throughout the year are also conducted to help individuals achieve financial security.