FINANCIAL PLANNING ASSOCIATION

www.FPAnet.org

FPA Overview

The Financial Planning Association® (FPA®) is the leadership and advocacy organization which connects those who need, support and deliver financial planning. FPA's 95 U.S. chapters represent tens of thousands of members nationwide. FPA also maintains relationships with 25 sister organizations around the world, representing 39 countries.

FPA fosters the value of financial planning and advances the practice and profession for its members, and the public at large. FPA believes all consumers deserve to receive professional care, quality and excellence, and that financial planning services should be delivered in accordance with the *FPA Standard of Care*.

FPA Key Leaders

- Marvin W. Tuttle, Jr., CAE -- Executive Director/CEO
- Martin Kurtz, CFP®, AIFA® -- 2011 President
- Paul H. Auslander, CFP® -- 2011 President-elect
- Tom L. Potts, Ph.D., CFP® -- 2011 Chair

Headquarters

4100 E Mississippi Ave, Suite 400
Denver, CO 80246
Phone: 800.322.4237

Washington DC Office

Phone: 800.322.4237

Websites / Online

- General: www.FPAnet.org
- Financial professionals: www.FPAnet.org/Professionals
- *Journal of Financial Planning*: www.FPAnet.org/Journal
- FPA Annual Conference: www.FPAAnnualConference.org
- FPA Social Networking: www.FPAnet.org/Social (follow us on Twitter and Facebook)
- Financial Planning Days: www.FinancialPlanningDays.org

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FPA for the Consumer

FPA offers financial literacy services and resources through various websites and online tools. The resources on these sites are intended to help the public understand the importance of the financial planning process and the value of objective, competent, client-centered advice.

General Public:

- The FPA consumer website provides tools and resources to:
  - Educate consumers about the benefits of financial planning.
  - Offer guidance for different financial stages in life such as saving for college or to buy a house, getting married, starting a new career, or planning for retirement.
- Website: www.FPAnet.org

FPA Pro Bono Program:

- Targets low income individuals and families striving to build assets and improve their lives but cannot afford to engage a planner on their own.
- FPA chapters work with community partners to provide financial planning to those in need.
- FPA chapters may also outreach to other populations to meet the specific needs of their communities.

PlannerSearch:

- The premier online tool connects consumers with expert FPA member planners.
- Consumers can search the database by location, asset and income minimums, planner specialty, and planner compensation models (e.g., commission, fee-based, etc.).
- Website: www.PlannerSearch.org

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Media Resources

- 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; some planners work with clients 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.
  - FPA's *Practice Management Solutions* magazine provides information on the newest trends in the financial planning community.
  - FPA Research Center has been conducting research since the organization's inception in 2000. It was officially formed in 2007 to empower the financial services sector with knowledge and an understanding of the financial planning process, including how it affects consumers, planners and firms.
  - FPA Press is publisher of 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
    - *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 Freedman, CFP®
    - *Financial Planning—The Next Step,* by Roy T. Diliberto, CFP®