



# FPA of Central Florida 34th Annual Symposium

An Update on Your Professional Membership Association



## OUR CORE MEMBER

Our Core Member is a  
CERTIFIED FINANCIAL PLANNER™  
professional.

## OUR PRIMARY AIM

To elevate the profession that  
transforms lives through the power  
of financial planning.



## OUR VALUE PROPOSITION

As a CFP® professional, FPA is your partner  
in planning by helping you realize your vision  
of success through practice support,  
learning, advocacy, and networking.

## OUR CORE POLICY

The CFP® certification and the standards  
it represents constitute the foundation  
of the financial planning profession.



**FPA'S LONG-TERM  
STRATEGIC JOURNEY**

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## THE RATIONALE

FPA

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The continually changing landscape of the financial planning profession, the greater financial services industry, and increased competition mean FPA needs to focus on solidifying its relevance and impact for members and the profession.

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## THE GOALS

FPA

**1**

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Streamline and maximize financial and professional staff resources supporting FPA's role and vision.

**4**

Maximize revenue potential across the Association's service lines and FPA's role and vision.





## Summit: FPA in 2034

By 2034, FPA will be the leading membership organization and trade association for financial planners with 30,000 members and \$20MM in annual revenue by focusing on driving maximum value through delivering unmatched Practice Support, Learning, Advocacy, and Networking for practitioners and partners of all backgrounds.





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FPA

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## Basecamp: FPA in 2026

With a united focus on being the partner in planning for CERTIFIED FINANCIAL PLANNER™ professionals, FPA is indispensable in supporting and developing the financial planners of today and tomorrow.

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## THREE-YEAR IMPLEMENTATION PLAN

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## THE THREE-YEAR OBJECTIVES

FPA

### PRACTICE SUPPORT

FPA supports your business objectives with the information, resources, and discounts you need – and want.

### LEARNING

FPA helps you build your competencies with a wide variety of relevant and accessible learning programs.

### ADVOCACY

FPA positions you as a leader and impactful advocate for financial planning among lawmakers, consumers, and journalists.

### NETWORKING

FPA provides you with the networking opportunities you want – and the sense of belonging you desire.

**Your Partner in Planning™**

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## PRACTICE SUPPORT

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Meet the needs of modern financial planning practitioners and their businesses.

- [PRIORITY] – FPA supports members and their businesses with tools, resources, and content they cannot get elsewhere throughout their lifecycle: Kickstart, Grow, Scale, and Transition.
- FPA offers robust lead generation.



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## LEARNING

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Serve as the educational epicenter  
of financial planner knowledge.

- [PRIORITY] – FPA is the publisher of record for the profession, including a pay-for-access online article database and Journal of Financial Planning micro-editions.
- FPA and chapters partner on programming that drives revenue.
- FPA offers a curated, intuitive, relevant, and timely learning experience.





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## ADVOCACY

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Lead in securing the legal recognition of financial planners and advancing financial literacy and wellness.

- [PRIORITY] – FPA is leading in advocating for the legal recognition of financial planners with a proposal that has been defined, drafted, and socialized.
- FPA has an established financial literacy and wellness program nationwide.
- FPA partners with national organizations to co-sponsor financial literacy legislation or programs.
- FPA exemplifies excellence in promoting and embracing diversity.



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## NETWORKING

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Deliver unparalleled connectivity as the hub for financial planners of all backgrounds.

- [PRIORITY] – FPA national events have are indispensable to the member experience through content, community, and connection that cannot be found elsewhere.
- FPA meets members where they are via technology.
- FPA and FPA chapters are aligned and working together to deliver an unmatched member experience.



## FOUNDATIONAL INTENTIONS

FPA

**Embrace  
Inclusivity**

**Partner  
Integration**

**Diversify  
Revenue**

**Maximize  
Resources**

**Chapter  
Collaboration**

**Maintain  
Mission**



A Few Benefits of Membership

# New Research: FinTech and Client Relationships

FPA



Groundbreaking research by eMoney Advisor and FPA has unveiled the game-changing impact of financial technology, particularly client portals, on the dynamics between financial planners and their clients.

The research, featuring insights from 849 financial planning professionals, goes beyond the efficiency of technology.

<https://engage.financialplanningassociation.org/clients-and-technology>

# Media Mastery 2.0



Developed with AdvisorPR, the new media training program builds on the already successful on-demand training members enjoy but takes it to another level.

The program is now available to all members through the FPA Learning Center.

[www.financialplanningassociation.org/advocacy/media-engagement](http://www.financialplanningassociation.org/advocacy/media-engagement)

# FPA MediaSource



Showcase your knowledge and expertise as a financial planner by appearing in the media.

FPA MediaSource has sent more than 7,600 journalist queries to FPA members over the past five years, including queries from CNBC, Wall Street Journal, MarketWatch, Kiplinger's Personal Finance, USA Today, Yahoo! Finance, among others.

[www.financialplanningassociation.org/advocacy/media-engagement](http://www.financialplanningassociation.org/advocacy/media-engagement)

# Investment Technology

FPA



TIFIN Wealth and FPA are partnering to support the growth of independent financial planners by extending access to TIFIN's personalized investment platform at no cost for FPA members who manage under \$100M in AUM.

This member benefit aims to empower financial planners with cutting-edge tools and resources to better serve their clients while making innovative technology more accessible.

<https://campaign.tifinwealth.com/fpa>



# Alternative Investment Education

FPA



All FPA members are eligible to receive discounted access to UniFi by CAIA™, an online series of educational offerings geared towards the needs of client- and adviser-facing financial professionals.

You now have greater access to educational materials that will help you address the fast-moving alternative investment universe.

[www.fpa.chalicenetwork.com/marketplace/unifibycaia](http://www.fpa.chalicenetwork.com/marketplace/unifibycaia)

# FPA Marketplace

FPA



Access many benefits designed for FPA members, especially our various insurance programs.

You can also access BenefitHub, which offers you potentially thousands of dollars in savings on a wide range of services and programs from top companies like Verizon, Costco, Geico, Avis, Hertz, Disney, AMC, Gap, and many more.

[www.financialplanningassociation.org/practice-support](http://www.financialplanningassociation.org/practice-support)

# Carson Coaching

FPA



- Access to Carson Coaching Online
- Access to FPA Group Coaching
- Discounts on one-on-one Executive Business Coaching
- Discounts on the Emerging Advisor Growth Accelerator Program
- Discounts on regional/national events
- Articles and videos

[www.coaching.carsongroup.com](http://www.coaching.carsongroup.com)



**CARSON**  
COACHING

# FPA National Events in 2024



**May 6-9, 2024**  
**Tucson, AZ**



**Aug. 20-22, 2024**  
**Phoenix, AZ**



**Sept. 18-20, 2024**  
**Columbus, OH**

[www.financialplanningassociation.org/learning/events](http://www.financialplanningassociation.org/learning/events)

# FPA Retreat 2024

FPA



FPA Retreat 2024 is the experience you need to get energized, explore innovation, and uncover disruption that is rocking your profession. Join us May 6-9 in Tucson, Arizona, at the Loews Ventana Canyon Resort for this unforgettable, one-of-a-kind event.

Register by February 26 to take advantage of an advance pricing — the lowest fee you will find!

[www.fparetreat.org](http://www.fparetreat.org)



# Supporting Chapter Programming

# Speaking Discounts with Kitces!



Since the program was introduced in March 2022, FPA chapters have saved more than \$248,000 on their educational programs with Kitces Speaking.

Kitces Speaking and FPA have renewed the agreement through December 2025.



Increases the discount to small and mid-sized chapters on virtual events to 30% – an additional discount on top of the baseline FPA discount, which allows smaller chapters to access Kitces speakers virtually at a 50% discount on the standard rate!

# Speaking Discounts with FBKG!



FPA and the Financial Behavior Keynote Group have partnered to support FPA chapters and their educational programs by helping them secure recognized and respected behavioral finance experts to speak at significantly discounted pricing.

FPA chapters can secure speakers at significant discounts for in-person or virtual presentations.

FPA chapters with fewer than 400 paid members can secure a speaker for a virtual presentation for an additional discount.





# Speaking Discounts with Julie Littlechild!



New discounted speaking opportunity with Julie Littlechild of Absolute Engagement.

Julie, a highly respected, sought-after speaker, is a premier thought leader in helping financial professionals build more client engagement.



Julie is an outstanding speaker who can engage your audience on subjects that will directly impact their bottom line. Chapters can now secure deep discounts to have Julie speak at virtual and in-person chapter events this year!

# Upcoming Speaking Discounts!



Two new discounted speaking offerings coming soon from Idea Decanter and The Kalli Collective to support chapter programming!

Idea Decanter will offer a significant discount on their speaking fees to address video marketing with your chapter members.

The Kalli Collective will offer a significant discount on their speaking fees to address branding and digital marketing with your chapter members.



**THE KALLI COLLECTIVE** LLC  
giving your brand a voice

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**Advocacy**  
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**Advocating For You**

# Advocacy Matters

FPA

FPA ensures the issues that matter most to you are incorporated into the rules and regulations that shape the trajectory of our profession.



BY PAST FPA PRESIDENT ED GJERTSEN, CFP®

**"Advocacy matters. And so do the thousands of us who speak for this growing profession. Now is the time for more of us to join with a unified voice to take charge of our profession."**

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InvestmentNews (June 2015)

# Four FPA Advocacy Priorities

➤ Legal recognition of financial planners through title protection

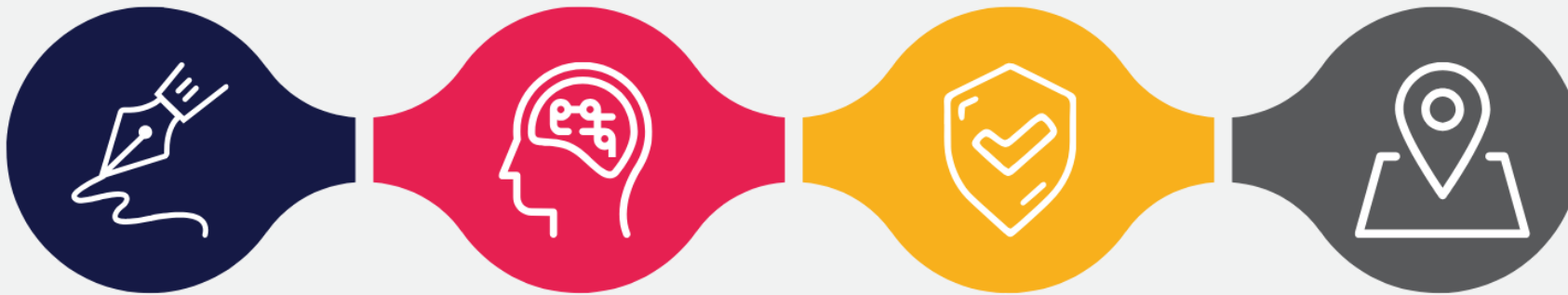
➤ Financial literacy and wellness

➤ Financial planning fee structures

➤ Taxation of financial planning services

## THE FOUR PILLARS OF

# Title Protection



### Title Usage

The legal recognition of the term financial planner may distinguish financial planners from other financial service providers.

### Professional Competency

The legal recognition of the term financial planner will establish criteria to earn the right to call oneself a financial planner without creating unnecessary regulatory burden for those who qualify to use the title.

### Consumer Protection

The legal recognition of the term financial planner may enable consumers to identify and engage with a qualified financial planner.

### Profession Advancement

The legal recognition of the term financial planner is a critical step in the recognition of financial planning as a distinct, essential profession.

# Title Protection Engagement Timeline

- We are taking an iterative process to ensuring all FPA Member voices have an opportunity to be heard and their viewpoints considered, in addition to other stakeholders in the financial planning ecosystem, all so the best possible approach is eventually realized.
- While we want to move expeditiously, we also acknowledge that an undertaking of this magnitude cannot be rushed.
- We are proceeding without any preconceived notions of what may eventually be proposed.



## > All-Member Virtual Town Halls

Held six town halls for Members interested in sharing their views and ideas. Nearly 500 members have participated.

## > Regional Chapter Leader Forums

Held five regional forums for chapter leaders to engage on the issue. Nearly 300 chapter leaders attended.

## > Member Survey

Survey has been in-field since early January and will remain open through the end of 2023.

## > OneFPA Advisory Council Discussions

Tile protection has been the focus of three Council meetings over the past year, including Sept. 2022, Nov. 2022, and June 2023.

## > External Stakeholder Meetings

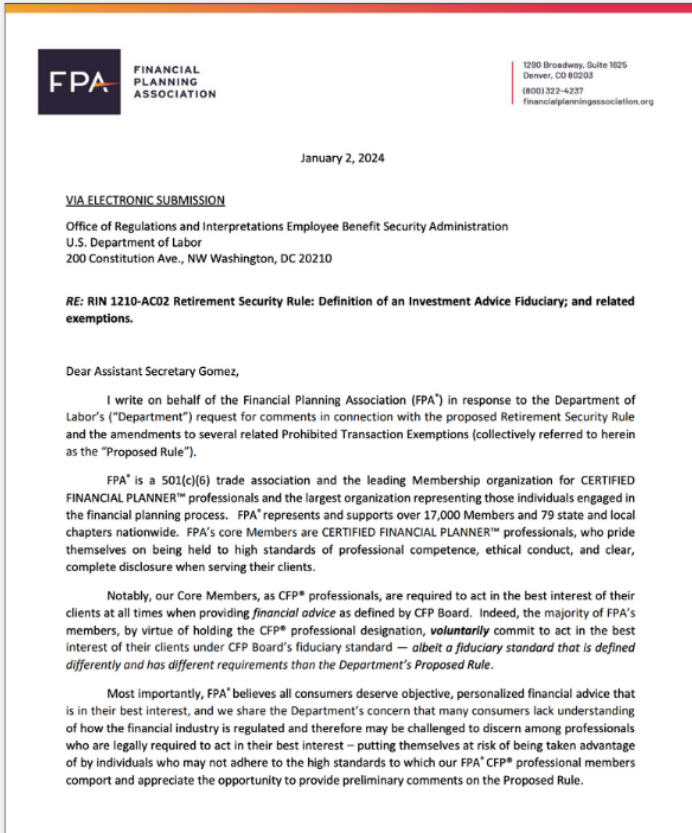
We have met with many external groups, including NASAA, SEC, DOL, FSI, AAAA, CFP Board, NAPFA, IAA, SIFMA, multiple broker dealers. More to come.





# FPA's Recent Advocacy Efforts

# U.S. DOL Proposed Retirement Security Rule



FPA submitted official comments on the U.S. Department of Labor's Proposed Retirement Security Rule.

Highlights FPA's commitment to initiatives that enhance investor protection, build trust, and ensure minimal burdens on you and our practitioner community.

Shares our concerns about implementation timelines and the need for clear guidance and compliance tools.



**Read The Letter**



# Building Tomorrow's Workforce

FPA



FPA joined more than 500 organizations to form the Tomorrow's Workforce Coalition, established to build support for the Freedom to Invest in Tomorrow's Workforce Act (S. 722 / H.R. 1477).

The bipartisan, bicameral Act would expand qualified expenses under 529 savings plans to include postsecondary training and credentialing, such as licenses and professional certifications, including CFP® certification.



[Read The Release](#)



# State-Level Advocacy is Critical



- The work chapters are doing - especially FPA of Florida - is important to supporting our members, protecting consumers, and elevating FPA.
- FPA wants to be your partner in advocacy by providing support when and where needed.
- We want to showcase your efforts and successes to help other chapters and councils learn what they can do to have an impact.
- FPA Public Policy Counsel Lauren Loney focuses her time on supporting chapters with legislative advocacy.



**Let's Take Your  
Questions!**

The FPA logo consists of the letters 'FPA' in a white, sans-serif font. A thin orange line extends from the top of the letter 'A' to the right. The logo is centered within a dark blue square background.

FPA

Thank you for making FPA  
**Your Partner in Planning™**

