

I am FPA.™

\$1.08 a Day Provides a Wealth of Member Benefits: 108 Reasons FPA is the Heart of Financial Planning™

1. **Annual Conference & Exposition** provides premier education, networking, continuing education credits & career development

2. **Journal of Financial Planning:** the award-winning, peer-reviewed, monthly publication featuring the profession's thought-leaders

3. New and improved **FPA member/ professional Web site** offering easy access to online resources and tools coming Summer 2008

4. Consumer media awareness of the value of financial planning and the profession— in excess of **100 million media impressions** touting the value of working with a financial planner in 2007

5. **FPA Press**
Provides wise and insightful publications that cultivate the body of knowledge and answer the needs of financial planning professionals

6.



Free online educational opportunities in the **Virtual Learning Center**

7. **Compliance support** and ongoing updates from the profession's experts

8. **Electronic publications** provide cutting-edge information to grow, maintain and enhance your practice

9. Numerous opportunities to earn **CFP Board continuing education** (CE) credit free or at a discount

10. **Practice management research** at your fingertips

11. **Marketing Toolkit**—Ready-to-use marketing and public relations materials

12. Customized **career planning**

13. **Members-only access** on the FPA Web site

14. **Partnerships** with AARP, National Association of Women Business Owners and American Pharmacists Association

15. Free **regulatory and licensing information**

16. **FPA Residency**—Helps new planners meet their CFP Board experience requirement

17. **PlannerSEARCH.org**
Exclusive **PlannerSearch™** network

18. **Financial literacy tools** through relationships with Junior Achievement and JumpStart Coalition

19. Live **ethics sessions**

20. Timely legislative updates through **Capitol Update**

21. Conferences and retreats provide **connections to colleagues**



I am FPA.™

22. Cost effective and **customized learning** experiences

23. **Online** Virtual Learning Center **discussions**

24. Templates for **marketing brochures and newsletters**

25. **Support** from peers & industry leaders

26. **FPA This Week**—the newsletter which keeps you current on the financial planning profession

27. Answer consumer questions directly via FPA's **Ask a CFP® Professional** e-mail hotline

28. **Self-study CDs** on the profession's latest topics

29. Opportunities for **national media exposure**

30. **FPA Café**—Lively online discussions

31. Find a mentor ... be a mentor ... through **Coach Match**

32. **Solutions**—the profession's leading practice management magazine



33. Local networking opportunities through FPA's **nationwide network of chapters**

34. Online **Practice Services Center** offering business ideas and practice management tips

35. Resourceful & helpful **FPA national staff**

36. **Learning opportunities** to meet any budget or schedule

37. **Leadership** opportunities at the **local level**

38. Stay in touch with **local issues**

39. **Study groups** hosted by chapters

40. Access to **marketing research, surveys, trend analysis**

41. **Cross-border network** of associated professionals to help you grow your practice

42. **Online access to** Virtual Learning Center **archived sessions**

43. *Journal of Financial Planning* **Between the Issues**—Receive bonus online content monthly

44. **Benchmark your practice** with the FPA Practice Management Scorecard



Opportunities to share and learn best practices

46. **Regional symposiums** presented by chapters

47. **Self-study ethics** programs



48. **Financial Frontiers Awards**—Recognizes the profession's most innovative ideas

49. FPA Career Center offering opportunities to help **secure interns**



Celebrating the profession and members

51. **FPA Business Solutions**—the advanced practice management conference

52. Access to **regular chapter meetings**

53.



a community of interest conference

54. Free CE credit

opportunities with every issue of *Journal of Financial Planning*

55. Discounts on programs to help members attain the CFP® certification

56. Nationwide network of **100 local chapters**

57. Professional recognition with the **Heart of Financial Planning Distinguished Service Awards**

58. Cross-border opportunities with international sister organizations

59.



Online **Career Center connects employers and job seekers**

60. Membership Longevity Awards recognizing your commitment to FPA

61. Special editorial supplements:

Broker-Dealer, Trends in Investing, FPA Boston 2008 and Retirement Distributions Planning



62. Demographic profiles of consumers via PlannerSearch™

63. Pro Bono opportunities through FPA allow you to give back to your community

64. Exclusive **FPA membership directory**

65. FPA's **humanitarian outreach** during catastrophic events (Hurricanes Katrina & Rita, 9/11)

66. Conference **programming centered around ethics**

67. FPA-PAC: Representing financial planners and issues affecting your practice in Washington, D.C.

68. Chapter **scholarships** for CFP® students

69. FPA MarketPlace—the directory for financial planning products and services

70. Member discounts on FPA products and services

71. Building relationships with the public and the media to promote the value of financial planning

72. Volunteer opportunities at national and chapter levels

73. Leadership and advocacy experts hard at work on your behalf

74. Access to **personal leadership development** opportunities

75. Grassroots public relations efforts at the chapter level

76. Member discounts on **client marketing brochures**

77. I am FPA.™ campaign highlighting client-centered financial planning

78. FPA member-to-member outreach during catastrophic events—providing office space, furniture, computers and more

79. Financial Planning Perspectives article series—enlighten clients and prospects about timely financial planning topics

I am FPA.™

80. Education your way—**live, online or archived continuing education** sessions
81. **Speaking opportunities** to consumer audiences
82. **Leadership content** at every FPA event
83. **Leadership** opportunities at the **national level**
84. **National media coverage** on important financial planning issues
85. **Advocacy** for the profession and the client
86. **Local speaking opportunities** at schools, colleges, libraries and more
87. **Private-labeled PlannerSearch™** reaching targeted online audiences
88. Building **relationships with regulators and legislators**
89. An organization of **like-minded professionals with a client-centric philosophy**
90. **Advancing the financial planning profession** for future generations of financial planners
91. **Connections to businesses** that support financial planners
92. Member discounts on products and services through **FPA affinity programs**
93. **Publishing opportunities** in *Journal of Financial Planning*
94. FPA's **strong voice on Capitol Hill**
95. **Learn from industry-leading experts**
96. Local **chapter-sponsored educational opportunities**
97. **Local media opportunities** at the chapter level
98. **Ongoing regulatory monitoring** that puts your interests first
99. Robust **consumer education** programs
100. Everyone benefits from **building relationships and increasing awareness**
101. **Comprehensive learning model** based on career stage and level of proficiency
102. **Online leadership training**
103. **National promotion** of the financial planning profession
104. **Direct access to regulatory bodies** and elected officials
105. **New member orientation** at FPA's Annual Conference and special offers for new FPA members
106. **Research Spotlight**—bimonthly research publication sharing trends and consumer research
107. Contributing to the **growth of the profession**
108. Ongoing dialogue on important issues affecting the **financial well-being of clients**



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The Heart of Financial Planning™