

Become the Best Financial Planner You Can Be

You Belong at the Financial Planning Association®



Change Tomorrows™

If you're like most financial planners, you chose this profession because it offers you the opportunity to make a meaningful and lasting positive impact on peoples' lives. You are part of a caring and helping profession, and you get up and go to work every day to make your clients' tomorrows better than today.

The Financial Planning Association® (FPA®) is made up of members like you, who do what they do to transform the lives of their clients, and all who need their service. They are members because their passion is to make a genuine difference, and their commitment drives them to care about becoming the best planner they can be.

Our members are dedicated to helping each other and the profession grow and thrive, because they know that the more they grow and evolve as financial planners, the better they can serve the clients of today and the clients of the future. FPA is a knowledge hub, inspiration source, career fuel and cheering section, and so much more; it's the place financial planning practitioners go to grow, inspire and be inspired, lend and amplify their voice, and belong.

We can't wait to welcome you home.



What Do I Get From My FPA Membership?



“FPA is an amazing support system filled with passionate financial planners who help each other every day. In my 20-plus years of experience in the financial planning profession, I have never encountered any other group that was so interested and willing to share their intellectual capital and to support new participants in our profession.”

Evelyn Zohlen, MBA, MS, CFP®
FPA Past President and 2020 FPA Chair

Belonging

The Financial Planning Association gives you access to a receptive community unlike any other where you feel heard, supported and involved. When you become a member, you'll have a wealth of opportunities to connect with the most skilled, passionate and diverse group of financial planners in the country.

Engage With Planners in Your Area

FPA has chapters all across the United States that offer in-person and virtual events specific to your area. Your local chapter is the perfect place to get face time with practitioners, members and financial planning thought leaders—right in your own backyard!

Join the Conversation on FPA Connect

Our compliance-friendly online community is the best place to find the questions, answers and topics that are most important to you.

Participate in FPA Knowledge Circles

Connect intimately with other FPA members on the areas of the profession you are most passionate about through virtual and in-person hosted gatherings and discussions.

Connect Through the FPA Activate Facebook Group

This vibrant social media forum is designed to be the go-to community and safe space for financial planners who are new to the profession and want to better understand financial planning, develop their skills and make informed career choices.

Build Your Network at FPA Signature Events

Our signature events are one of the most powerful ways for members to lend their voices to the conversation, share ideas and be an integral part of moving our community forward.

“FPA is a hub for new planners. When I came into the association, I had just started my own practice and found support through many late-night conversations with other planners. If I were just starting out now, I’d join FPA knowing that there are people who have been in this business for years and can help others move forward in their careers.”

Frank Paré, CFP®

FPA Past President and Board Member



Inspiration

While there are many factors that contribute to success in the financial planning profession, there's simply no substitute for relevant, useful, quality content. FPA supplies you with timely ideas, unique perspectives and forward-looking points-of-view that have value. Whether you're looking for technical knowledge, new insights or simply a new lens, stay in the know with these publications and resources.

Journal of Financial Planning

FPA members receive a monthly print subscription and unlimited digital access to the *Journal of Financial Planning*, the gold standard when it comes to credible thought leadership for the profession.

FPA Next Generation Planner

This monthly digital publication provides practical, valuable content to help new financial planners develop personally and professionally as they work toward their most important career goals.

"You're A Financial Planner, Now What?" Podcast

Each week, FPA offers a brand new edition of the "You're A Financial Planner, Now What?" podcast featuring influential guests, inspirational stories, valuable insights and expert commentary on a wide range of financial planning topics.

FPA Practice Management Blog

The FPA Practice Management Blog provides members with the latest practice management content from leading experts in the field on topics like marketing, client skills, technology, human resources, compliance and operations.

Twitter (@fpassociation, @FPANexGen and @FPAPubs)

Our Twitter handles offer an excellent way to keep up with FPA news and members across the country and in your local area.

Growth



FPA provides knowledge, guidance and mentorship to help you continually advance and improve so you can meet the changing needs of your clients.

Signature Events

Our signature events deliver an opportunity to fast-track your personal and professional growth by connecting with your peers and learning from the top minds in financial planning.

- **FPA Annual Conference:** The largest global gathering of CFP® professionals and thought leaders in the profession.
- **FPA Retreat:** An annual gathering of advanced financial planning practitioners who are passionate about refining their craft and committed to working together to shape the future of the profession.
- **FPA NexGen Gathering:** One of the only events designed specifically for new financial planners, Gathering offers attendees the chance to learn from industry thought leaders and each other.
- **FPA Residency:** This intensive, week-long learning program is designed to immerse newly or soon-to-be certified CFP® professionals in practicing the “art of financial planning.”
- **FPA Advocacy Day:** FPA members head to Washington, D.C., to educate members of Congress about our profession, advocate for vital policy issues and protect the future of financial planning.

Online Learning

The FPA Online Learning Center provides access to relevant and powerful learning opportunities for all career stages through live webinars, self-study programs and on-demand content designed and delivered by top experts.

FPA Job Board

FPA members can explore career opportunities or access a large pool of job seekers on FPA's Job Board, a centralized source for financial planning employment.

FPA Research and Practice Institute™ (RPI)

The FPA RPI provides original research on business-centric topics and issues, including operations, personnel, human resources, marketing and technology.

FPA Coaches Corner

This resource is your one-stop-shop for content and tools from the most recognized business coaches in the profession. Topics cover everything from marketing and business growth to productivity and technology.

FPA Member Discounts

FPA members get exclusive savings from the top education, marketing, insurance, practice management and software products and services in financial planning.





"FPA is invaluable to my career. From finding my first internship and job to being paired with my first mentor and finding planners and businesses I could aspire to be like, it has been there through every step of my journey. Not only has the association helped me advance my career, it's also helped me cultivate a passion for financial planning by showing me the power of financial planning and how I can serve my clients better."

Hannah Moore, CFP®

FPA NexGen Leader and Host of the You're a Financial Planner, Now What? podcast

Amplification

FPA gives financial planners a unified voice that represents our shared values, vision and collective interests. Our members use the platforms, stages and forums that FPA provides to raise awareness and discuss ways to bring financial planning to more people.

Lend Your Voice to Legislative Efforts

From local and state FPA Advocacy Days to the ability to influence the regulation of financial planning practices, FPA gives members a platform to engage in protecting and guiding the profession.

Give Back With Pro Bono Planning

FPA offers opportunities for members to get involved in pro bono financial planning efforts at both the national and local levels.

Become a Go-To Source for the Media

Make your voice heard through FPA MediaSource, which offers access to local and national media.

Access Our Client Referral Service

FPA PlannerSearch® is an online referral service that connects consumers to CFP® professionals who best fit their needs.

Share Your Expertise

FPA members are encouraged to read the contribution guidelines for the *Journal of Financial Planning*, FPA Practice Management Blog and *FPA Next Generation Planner*, and submit an article or a Letter to the Editor on a topic they are passionate about.

You work tirelessly to transform the lives of your clients, and we want to do the same for you. We hope you will take this opportunity to join your professional community so that we can get where you're going, together.

**Let's Change Tomorrows.
Let's Start Today.**

Become a Member Now
JoinFPA.org