



### Make Your Voice Heard on CFP Board's Proposed Changes to the *Standards of Professional Conduct*!

This special issue of "Take 5" is dedicated to the work that the FPA Member Advocacy Council (MAC) is doing to collect member feedback and sentiment on the recently announced proposed changes to CFP Board's *Standards of Professional Conduct*.

The following news items will provide you with information to help you better understand the proposed changes and provides CFP® professional members of FPA opportunities to share their opinions!

#### URGENT: Take the MAC Survey on CFP Board's Proposed Changes!

A [brief survey](#) of CFP® professional members of FPA is now available to help the MAC collect the opinions of our members on CFP Board's proposed changes. The survey is a critical component of the feedback plan for the MAC and will help ensure member sentiment is taken into account as the MAC works with the FPA Board of Directors to draft an official comment letter to CFP Board. Please [take the survey](#) by July 27th!

#### Send in Your Opinions on the Proposed Changes Via Email to the MAC

The MAC is interested in gathering any and all thoughts on the proposed changes from CFP® professional members of FPA and encourages members to send in their thoughts via email to [FPAMAC@OneFPA.org](mailto:FPAMAC@OneFPA.org). While the names of members sending in their opinions will be held in confidence, the feedback shared will be instrumental in the development of an official comment letter FPA will send to CFP Board. Be sure to send your feedback ASAP!

#### View the MAC Webcast on CFP Board's Proposed Changes.

On July 6th the MAC held a **one-hour webcast** with CFP® professional members of FPA to begin the process of gathering qualitative feedback from members on the proposed changes. MAC Chair Nick Nicolette, CFP® quickly discusses the major changes proposed by CFP Board and hears from several members who wanted to share their initial reactions to what CFP Board is proposing. A recording of that call is available [HERE](#).

#### Check Out the Information CFP Board is Providing on the Proposed Changes

CFP Board is providing information on the proposed changes on their [website](#) and all CFP® professional members of FPA are encouraged to check them out. CFP Board is also planning to hold several public forums between July 24-27 in cities across the country and members are encouraged to attend if they are convenient. You can learn about the public forums and other ways of providing feedback to CFP Board directly by clicking [HERE](#).

#### What is the FPA Member Advocacy Council (MAC)?

The FPA Member Advocacy Council (MAC) is the official mechanism within FPA that is gathering feedback from members on the activities and programs of regulatory and certifying agencies. The goal of the MAC is to ensure all FPA members have their voices heard on those activities, processes and procedures that govern financial professionals and impact the profession of financial planning. FPA members are encouraged to participate in the various feedback opportunities being employed by the MAC so FPA can best represent the interests of our members.

#### Attention FPA Chapter Leaders:

Each month FPA will provide you with a quick rundown of five news items worth sharing with chapter members at meetings, events and in newsletters. If you have any questions or need any clarification, please email Ben Lewis at [BLewis@OneFPA.org](mailto:BLewis@OneFPA.org).