

FINANCIAL PLANNING ASSOCIATION



TAKE 5

AUGUST 2018

Pro Bono Financial Planners Needed to Help Families Living with Cancer

Every day, families that are battling cancer make dangerous decisions like skipping a chemotherapy appointment so they can afford to feed their families. They often suffer financial distress that adversely impacts their ability to complete treatment and decreases their chance of survival. As a CFP® professional, you can empower these families, lending your skills and knowledge to help them manage their finances so they can focus on getting well. Volunteer for the Financial Planning for Cancer campaign today! For questions, contact Kurt Kaczor.

Register for FPA Residency by August 20 and save up to \$500

Join new and aspiring CFP® professionals at FPA Residency Oct. 19 - 24, 2018. FPA Residency is an experiential learning program designed to engage, inspire and empower new CFP® professionals to be confident in their ability to create meaningful relationships with their clients. Additionally, residents can earn 28 CFP® continuing education credits or three months of experience toward CFP Board's three-year requirement. Register today.

FPA Coaches Corner Spotlight: Three Most Common Cyber Threats and How to Deal with Them

Fraud incidents have increased by more than 130 percent during the past year, according to a recent report by PwC. Join Brian Edelman, CEO of FCI, and Ben Lewis, Director of Public Relations at FPA, to learn the most common cyber threats affecting financial advisers and firms, the proper steps to take after these incidents, and defend against them. This interactive, 60-minute virtual session will take place on Aug. 30 on 4 p.m. ET. Register now.

What Every Financial Planner Should Know about the Tax Cuts and Jobs Act

Navigating the complex Tax Cuts and Jobs Act can be a huge undertaking. To help FPA members sift through all the changes, FPA's *Journal of Financial Planning* has developed a series of articles on tax reform including, 2018 Tax Planning Opportunities Under the Tax Cuts and Jobs Act, Tax Reform Changes Affect Planners and their Business Clients, and Understanding Taxation of Dependent Children's Income after Tax Reform. Members can also learn more about the Section 199A deduction by viewing this Knowledge Circle recording.

IMPORTANT: Make sure Congress hears from you on potential changes to the tax code. Learn more <u>HERE</u>.

Make the Leap from Theory to Practice at the 2018 FPA Annual Conference

Are you a financial planner who believes constant improvement is key to long-term success? Join us at the <u>FPA Annual Conference</u>, an event designed to provide you with the tools, strategies and ideas you need to take your practice to the next level. The event, held Oct. 3-5 in Chicago, will feature top-level content and discussion on issues critical to the profession. <u>Register now.</u>

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Since 2009, FPA has partnered with Ryan Insurance Strategy Consultants to offer FPA members an industry-leading Long Term Disability plan, and recently launched a group voluntary Term Life plan. They also consult with advisory firms in making insurance product recommendations and their network of advisers are available to help solve more complicated insurance planning issues. Learn more at www.ryan-insurance.net.

Attention FPA Chapter Leaders: