Final OneFPA Network Plan Coming Soon!

Since the OneFPA Network vision and draft plan was formally introduced in November 2018, we engaged key stakeholders by conducting a nationwide Listening Tour, introduced a Second Iteration of the OneFPA Network Draft Plan, and solicited additional input through a 45-day comment period. A **Final OneFPA Network Plan**, which represents the culmination of a multi-year journey to create a shared vision for the future of the association that ensures FPA's viability, strength, impact and relevance, will be announced on July 11. Stay tuned for details!

FPA to Provide Technology and Operations Content with New Coach

The FPA Coaches Corner is pleased to introduce Charesse Hagan as the Technology and Operations Coach. Charesse helps financial planners work smarter, grow their firms, and offer exceptional services to their clients by increasing efficiencies and maximizing their current technology suite. Charesse can help you combine Technology and Operations to elevate your practice. The FPA Coaches Corner brings members some of the best and brightest thought leaders in the industry to power the business of financial planning. Access now.

Power Up at #FPAConf19

Playing video games is a guilty pleasure for FPA's director of marketing, who says conferences are designed with similar goals to a game. His tips will help you power up at the Annual Conference this October in Minneapolis. And if you want to keep more of your galactic credits, register by July 26 to secure the best price! Read the post.

FPA Coaches Corner Spotlight with Adam Kornegay

Join FPA's Messaging and Marketing Strategies Coach for Back to Basics: Adjusting/Adapting Your Style to Different Generations and Personalities on July 18 at 4 pm ET. In this interactive session, Adam Kornegay, RCC™ will present concepts to help you identify key characteristics and motivations of a client and adapt to those differences in a meaningful and authentic way in your conversations and marketing efforts. Participants will have the opportunity to share stories and examples to learn from each other.

Fulfill your CFP® Ethics CE Requirement

Join the Ethics CE: CFP Board's Revised Code and Standards – Elevating the Profession on July 17 at 2pm ET to learn more about the CFP Board's new Code of Ethics and Standards of Conduct that will take effect on Oct. 1, 2019. Attendees will learn how to identify the structure and content of the revised Code and Standards, how to apply the Practice Standards when providing financial planning, recognize situations when specific information must be provided to a client, act in accordance with CFP Board's fiduciary duty and fully disclose and manage Material Conflicts of Interest. This live event is available for 2 CFP CE credits. Register today.

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FINANCIAL PLANNING ASSOCIATION

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That's our team's commitment to you. Our goal is to provide exceptional member service. If your needs were not handled in an efficient and professional manner—or if you had a positive experience you'd like to share—we want to hear from you. Please call (888) 806-7526 or email us feedback@onefpa.org.