



Explore FPA's new Group Health Plan that will save you money!

The FPA Group Health Plan, created in partnership with Ryan Insurance Strategy Consultants (RISC), is available exclusively to FPA members and their employees, and is designed to meet your firm's health insurance needs while minimizing costs. Plans are available in most states for groups of 2-50, with rates approximately 25% lower than comparable ACA plans. [Learn more](#) and take a look at the second page of this Take 5!

FPA celebrates the 50th anniversary of financial planning

Fifty-years ago, 13 financial service industry leaders met in Chicago to discuss the creation of the financial planning profession. In honor of this major milestone, FPA invites you to learn more about the historic event that launched the profession and our community leaders aspirations for the next 50 years. [Watch this video](#) that commemorates the 50th anniversary of the financial planning profession.

Registration is open for FPA Retreat 2020

Join us at FPA Retreat 2020 to engage with financial planning top thinkers, trailblazers, and change makers to ignite your passion and shape the future of the profession. The spirit of friendly discourse, a shared commitment to improvement and development, and a structure without formal boundaries promises to cultivate powerful interactions and connections between a group of planners at the top of their game. [Register to attend FPA Retreat](#), May 4-7, 2020 at the Hyatt Regency Lost Pines Resort and Spa in Cedar Creek, Texas by Feb. 7 and save \$200 on registration!

Invest in the future of the profession

As a financial planning professional, it's essential you're able to share your voice on issues that affect your business and your clients. The FPA Political Action Committee (FPA-PAC), a federally registered political action committee devoted to advancing the interests of the financial planning profession, can help you do just that. [Learn more about the FPA-PAC](#) and how you can help make a difference in elevating the profession that transforms lives through the power of financial planning.

Explore the latest issue of the FPA Next Generation Planner

In partnership with FP Transitions, FPA issued its November issue of *FPA Next Generation Planner*, an incredibly practical and ridiculously valuable monthly publication designed exclusively for those who are new to the financial planning profession. This edition features giving back with pro bono financial planning, highlights from the 2019 FPA Annual Conference, why planners leave the profession, and more. FPA members interested in receiving the monthly issues of the *FPA Next Generation Planner* can [download](#) the app on their Apple, Android or Windows devices.

Take the next step in your career with the FPA Job Board

FPA is committed to providing financial planners with resources that help them advance in their career journeys. With that goal in mind, the FPA Job Board was redesigned and re-engineered to make it more user-friendly and intuitive, while making it a more impactful tool for both employers and job seekers. While the primary focus is connecting employers with future employees and interns, the new platform also includes some exciting features, including resume writing, reference checking, and career coaching services (additional costs apply). Whether you are seeking the best talent in the profession or the next opportunity in your career, the FPA Job Board is here to help. [Learn more](#) about the FPA Job Board.

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RYAN INSURANCE
STRATEGY CONSULTANTS
"Protecting Your Financial Plans Since 1978"
An FPA Strategic Partner

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.



FPA Group Health Plan

DISCOVER FPA'S MEMBER-ONLY HEALTH PLAN

FPA is proud to be one of the first to market with a national† group health plan exclusively for members, their employees, and their families! Now is your chance to control costs while giving your employees plan options designed specifically for their needs.

- Level premium self-funded plans for groups of 2-50 (medical underwriting required)
- Rates approximately 25%** lower than comparable Affordable Care Act (ACA) plans
- Customized group health plans with different co-pays and deductibles are accessible
- Short-term medical plans, medi-gap products and HSA plans are also available

GETTING STARTED

Visit the [FPA Group Health Plan website](#) or call Broker Source*** at 913-333-3381 for additional information about this FPA member-only group health plan and to [GET A QUOTE](#).

If you have any questions, please reach out to FPA Member Services at 800.322.4237 option 2 or MemberServices@OneFPA.org.

"We saved thousands of dollars on a plan that's almost the same as our old one. I was surprised by how easy the process was. Ryan Insurance took care of all the setup and answered my questions right away. I've already recommended them to a colleague at another firm."

—Christine Damico, Director of Human Capital



† Due to individual state regulations, plans not yet available in DE, HI, MT, NC, NH, NY, and DC.

* National General Benefits Solutions, incorporated in 1965, focuses on providing small- and mid-sized employers with benefits options previously only available to large employers – helping employers lower costs while providing quality benefits to their employees. Rated A- (Excellent) by A.M. Best.

** Potential savings based on standard level premium self-funded plan rates compared to similar ACA rated products.

*** Broker Source has been selected by Ryan Insurance Strategy Consultants to provide the administration for the FPA Group Health Plans.

