



#### New Member-Exclusive Newsletter from FPA and CNBC

FPA and CNBC have joined forces to launch **Money Matters**, an exclusive newsletter that delivers the latest news from CNBC right to your inbox. Curated by CNBC journalists covering the world of investing and personal finance, Money Matters helps FPA members stay on top of important news and trends to better serve clients. [Opt in to Money Matters now!](#)

#### Group Health Plan – Exclusively for FPA Members

The FPA Group Health Plan, created and delivered in partnership with Ryan Insurance Strategy Consultants (RISC), is available exclusively to FPA members and designed to meet your firm’s health plan needs while minimizing costs. Plans are available in most states for groups of 2-50, with rates approximately 25% lower than comparable ACA plans. [Start saving now!](#)

#### The Advisory Roadmap to 2030: Growth Through Innovation and Specialization

A majority of financial professionals don’t have a business plan in place, according to key findings from the [Advisory Firms in 2030: The Innovation Imperative](#) report revealed by FPA and SEI at the 2019 FPA Annual Conference. To help financial planners anticipate and plan for client’s changing needs over the next 10 years and beyond, FPA and SEI unveiled their latest research paper and second in the Innovation Imperative series, “Advisory Firms in 2030: Growth by Specialization” whitepaper. [View the whitepaper now](#) to learn how to meet the evolving needs of your clients and achieve success in the years ahead.

#### Patty Kreamer joins the FPA Coaches Corner as the Productivity Coach

Patty Kreamer, CPO® of Productivity Uncorked, LLC joined the FPA Coaches Corner in March to help financial planners take control of their time, brain clutter, inbox, interruptions, distractions and anything getting in the way of productivity. A Certified Professional Organizer® and Productivity Coach, Patty has personally improved the productivity and organization of thousands of lives. FPA members get free exclusive content and discounts on additional services from Kreamer. [Access now.](#)

#### Viva Las Vegas: FPA NexGen Gathering 2020 is Heading to the City of Entertainment

If you’re searching for a reason to join the best and brightest minds of the next generation of financial planners, look no further. FPA NexGen Gathering is going to Las Vegas this June! It’s the perfect time (and place) to connect with peers, discover new ideas, activate your curiosity and ignite your love for the profession...all while rolling the dice in the other city that doesn’t sleep. An event dedicated solely to next generation planners, planners will have opportunities to discuss hot topics and trends facing the future of the profession and get a chance to learn from top minds in the profession June 21-24, 2020 at Sahara Las Vegas. [Register now.](#)

\* [Scholarship applications](#) will be accepted through Mar. 20, 2020.

#### Get a Mooove on Your Texas Retreat Plans

If you’ve been searching for those who share your commitment to changing people’s lives through the power of financial planning, then you have to attend [FPA Retreat 2020](#). FPA Retreat is the place where advanced financial planning practitioners put their passion for planning to work in pursuing mastery, refining leadership skills and working together to shape the future of the profession. Join us May 4-7, 2020 at the idyllic [Hyatt Regency Lost Pines Resort](#) in Cedar Creek, Texas for insights on the topics that matter, discussions that get to the heart of financial planning and, let’s be honest, one too many smoked ribs. [Register today.](#)

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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](http://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](mailto: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.*

National General

