At FPA, we are focused on helping our members in the spirit of our Primary Aim, and we love what we do. Our new quarterly Snapshots are designed to share the work we are doing together in support of our mission, and to highlight the many different ways our passionate members and volunteers are getting involved through the wide range of programs and initiatives available through the association.

**FPA Latino Knowledge Circle:** Expanding efforts to serve the diverse needs of financial planners, FPA launched the FPA Latino Knowledge Circle in the first quarter. FPA members who are of Latino descent now have a professional home to collaborate, share ideas, engage in professional development, promote the profession among the Latino community and make connections with the more than 50 Latino financial planners already participating in the new Knowledge Circle. View the press release.

**Richard B. Wagner Memorial Scholarship:** In honor of the late Dick Wagner, FPA and the CFP Board Center for Financial Planning jointly established the Richard B. (Dick) Wagner Memorial Scholarship fund to support aspiring young professionals who are committed to the CFP® designation. Led by FPA NexGen, this scholarship is available for recipients to attend FPA NexGen Gathering or FPA Residency.

**FPA Connect:** FPA members continue to connect and boost their engagement with peers via FPA’s online communities, including our flagship member-only forum, FPA Connect. From January 1 through March 31, FPA Connect saw a 15 percent increase in overall participation and a 35 percent increase in new discussion threads.

**FPA Activate:** Launched in 2017, this Facebook community continues to grow at a rapid pace and currently has more than 1,500 members including students, career changers, CFP® professionals and new financial planners.

FPA’s network of 88 chapters and state councils coast-to-coast make it possible for members to share ideas and thoughts important to them and the profession with peers locally. A big THANK YOU to our 861 volunteer leaders who currently serve on FPA chapter boards for their time and effort to bring those in the financial planning community together!

And thank you to the 77 FPA chapters that participated in the four-month Listening Tour on the OneFPA Network draft plan. That represents 90% of all FPA chapters. Thank you for making your voice heard!

“\(\text{I’m thrilled to be part of a community that attends to the needs of Latinos in the financial planning profession.}\)"

Louis Barajas, EA, CFP®
FPA Member
Los Angeles, Calif.

Learn more about FPA Communities.
**State Advocacy Days:** During the first quarter, 153 FPA members participated in 15 FPA State Advocacy Day programs. Leaders also met with nine State Securities Directors and State Treasurers offices.

**Professional Certification Coalition (PCC):** FPA attended its first in-person meeting with the PCC to address the concerning efforts to enact legislation that would undermine the recognition of certifications developed or offered by private organizations on February 13.

**Massachusetts Division of Securities Investment Adviser Fee Table Working Group:** The FPA Legislative and Regulatory Issues Committee has been instrumental in providing the Massachusetts Division of Securities Investment Adviser Fee Table Working Group recommendations on drafts for different iterations of a possible fee table that would help consumers easily understand how they are being charged by financial professionals and will be proposed in future rule-making. FPA attended the Working Group on February 28.

**Nevada Proposed Fiduciary Duty Regulation:** FPA submitted formal comments through the Financial Planning Coalition on fiduciary duty regulation proposed by Nevada on March 1.

**Financial Exploitation of Vulnerable Adults:** FPA and its members submitted written and oral testimony in Arizona and New Hampshire regarding the financial exploitation of vulnerable adults. FPA members were instrumental in obtaining favorable changes to the legislation in both states.

**FPA Member Advocacy Council (MAC):** The MAC conducted a member survey to get feedback on CFP Board’s revised procedural rules and submitted a comment letter on behalf of FPA. Also, the MAC was able to assist an FPA member with an issue related to their Investor.com score. According to the member, “As a little guy, it’s important to be supported by an organization, which is one of the reasons why I like being part of the FPA.”

Learn more about FPA Advocacy and our upcoming 6th Annual FPA Advocacy Day in Washington, D.C.

**FPA Members Transform Lives Through the Power of Financial Planning**

**Financial Planning for Cancer Program:** In partnership with the Foundation for Financial Planning, Family Reach and CENTS, FPA continues to actively recruit pro bono financial planners for the Financial Planning for Cancer Program. Through this effort, 11 FPA members completed the on-boarding process to volunteer to serve families in Q1 2019, and 39 FPA members have been matched to serve families so far this year. View the Financial Planning for Cancer 2018 Annual Report.

**2019 California Wildfires:** FPA of San Francisco members volunteered time to assist California wildfire survivors. Learn more.

**Pro Bono Initiative:** FPA of Minnesota members volunteered to help families navigate finances after receiving an unexpected medical diagnosis or experiencing a natural disaster. Learn more.

“My first State Advocacy Day was delightful. Our legislators were approachable and engaged. The FPA Advocacy Team is a wealth of information on the national level to help state legislators get a sense of how to proceed.”

Christi S. Powell, CFP®
FPA Member
Edmond, Okla.
**FPA Next Generation Planner:** To help new financial planners develop personally and professionally as they advance on their career journey, FPA revealed its first edition of the *FPA Next Generation Planner*. This new publication was made possible through FPA’s strategic partnership with FP Transitions. [Learn how](https://www.OneFPA.org) to download the app-based publication and view the [press release](https://www.OneFPA.org).


**The Financial Planner’s Guide to College Funding Advice:** In partnership with Capstone College Partners™, FPA launched *The Financial Planner’s Guide to College Funding Advice*, an eight-module, self-study online course that helps financial planners advise college-bound families on how to pay for college as well as build a college planning niche in their practice. View the [press release](https://www.OneFPA.org).

**You’re a Financial Planner, Now What? Podcast:** In collaboration with TD Ameritrade Institutional, FPA and host of the “You’re a Financial Planner, Now What?” [podcast](https://www.OneFPA.org), Hannah Moore, CFP® offered new podcasts to address the diverse needs encountered by financial planners new to the profession.

Learn more about [FPA Professional Development](https://www.OneFPA.org), including upcoming signature events [FPA Retreat](https://www.OneFPA.org), [FPA NexGen Gathering](https://www.OneFPA.org), [FPA Residency](https://www.OneFPA.org) and the [FPA Annual Conference](https://www.OneFPA.org).

“NexGen planners want to learn best practices for emerging as lead planners, fostering strong client engagement, developing content and presentation expertise, and attracting ideal clients, to name a few. *FPA Next Generation Planner* responds to those needs and addresses topics of interest to our newest generation of financial planners.”

Autumn Campbell, CFP®
2019 President
FPA NexGen®
FPA Coaches Corner: Barbara Kay, MA, LPC, RCC, joined the FPA Coaches Corner as our new ‘Career Coach’. Kay guides not only FPA’s NexGen members, but all members, on their career journeys to help them reach new levels of productivity, profitability and success. View the press release.


FPA Job Board: A newly re-designed and re-engineered FPA Job Board was launched to help financial planners and employers easily connect and explore rewarding and meaningful financial planning career opportunities. View the press release.

FPA MediaSource: At the end of the first quarter in 2019, 1,123 CFP® professional FPA members are participating in FPA MediaSource and more than 3,600 queries have been sent to members since inception. The first step for CFP® professional members to be part of FPA MediaSource is to participate in a virtual all-member media training. Training is also available for FPA chapters upon request.

Learn more about FPA Business Support.

Coming Soon!
New research from FPA, Janus Henderson Investors and Investopedia will be released on May 8 at FPA Retreat 2019. The War on Stress looks at the issues providing stress for financial planners and investors and what they are doing—and what can be done—to combat that stress.

“FPA MediaSource has been an amazing benefit to my FPA membership. Not only have I been featured in numerous publications, but it has also really helped with my personal branding.”

Malik Lee, CFP®
FPA Member
Atlanta, Ga.

“FPA MediaSource is an easy to use, immediate link to being quoted in the media. It’s a best kept secret of FPA membership worth the annual dues alone.”

Byrke Sestok, CFP®
FPA Member
Harrison, NY
The OneFPA Network is a critical initiative that seeks to address FPA’s current organizational structure, so the association is best positioned to fulfill its Primary Aim: *To elevate the profession that transforms lives through the power of financial planning.* The goal is to ensure FPA’s viability, strength, impact and relevance for current and future members and volunteers by creating a transformative reorganization that unites FPA and its communities through greater alignment and integration.

While the OneFPA Network draft plan was formally introduced in November 2018, the first quarter of 2019 was focused primarily on completing a four-month Listening Tour. During this time, the OneFPA Transition Task Force and the OneFPA Technology Task Force were formed to support initial steps in this journey.

The OneFPA Transition Task Force, comprised of equal representation of national and chapter leaders, carefully and objectively reviewed feedback from the Listening Tour and identified common themes that were central to determining changes to the original draft plan. As a result, FPA announced the availability of the **Second Iteration of the OneFPA Network Draft Plan** on April 16 and the start of a 45-day comment period for all stakeholders to provide further input that will conclude on May 30. The new draft plan and other supporting documentation is available at [www.OneFPANetwork.org](http://www.OneFPANetwork.org).

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Visit the [Microsite](#)

Review the [Plan](#)

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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.