

MEMBERSHIP TOOLKIT

2017

Financial Planning Association®

Welcome to the Financial Planning Association's (FPA®) 2017 membership team. The team at FPA Headquarters is excited and eager to support you in your volunteer role and partner with you on your chapter's membership initiatives in the year ahead. Together, we ensure that FPA's leadership as the association for the financial planning profession and recognized and largest professional association for CFP® professionals in the U.S., continues and strengthens through the sustained participation of our valued members.

One very important tool that will help you with your membership initiatives is this Membership Toolkit. This document contains information, tips and tools for recruitment, engagement and retention. It will serve as a resource for you and your chapter in the year ahead. Please feel free to provide a copy of it to your membership engagement committee and chapter leadership, and to the next Membership Director as part of your succession plan.

FPA's annual Chapter Leaders Conference, November 10-12, 2017 in Broomfield, Colorado provides a great opportunity to gain knowledge, strategies and insights for equipping you in your role. We hope you'll join us for this event that brings together Membership Directors, Chapter Executives, and those leaders passionate about membership for interactive discussion and learning. It's also a great opportunity to network with other Membership Directors and chapter leaders to create connections you can tap into to share information and local best practices for recruitment, retention, leadership, engaging members, partnering with allied organizations and much, much more.

Our team invites you to contact us anytime. We look forward to working with you as together we continue to grow FPA and create a strong professional association that provides value to our members helping them thrive and succeed in their careers.

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Introduction

In this section you'll find general FPA information, including a definition of your role as Membership Director and information on how to prepare for the year ahead.

FPA General Information

Often chapters are asked to give a description of FPA and/or the chapter. The language below is suggested by FPA. You can use what you feel is most important, depending on your audience:

The Financial Planning Association® (FPA®) is the indispensable force in the advancement of today's CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals, educators, students, and others who support and enable the financial planning process. Membership in FPA provides One Connection™ to tools and resources for professional development, business success, advocacy and community that elevate and increase your knowledge, energize and grow your business, protect and advance the profession, and expand your connections.

Core Benefits:

- **Professional Development:** CFP® professionals who seek foundational and advanced financial planning knowledge have access to FPA's highly-regarded national, state, and local conferences, webinars, resources and publications, including the award-winning, peer-reviewed *Journal of Financial Planning* that provide the latest information and access to valuable Continuing Education credits.
- **Business Success:** To grow a business today, financial planners must have access to research, referrals and the latest tools on practice management. FPA offers CFP® professionals a rich platform of business-building resources, including virtual learning and research, discounts on essential products and services through the Member Advantage Program and referrals to new clients via the *PlannerSearch* tool.
- **Advocacy:** The profession of financial planning is growing, and FPA is leading the way for CFP® professionals. As the recognized name in financial planning, FPA is the absolute champion and advocate for those who have worked to build prosperous and ethical businesses and who don't want outside forces diminishing what they have built. To this end, FPA provides members with representation at the federal level while providing the necessary support for members and chapters to take action within local and state governments to advocate for the recognition of financial planning, including positive outreach to their communities and public.
- **Community:** Financial planners who take the time to meet and learn from their colleagues are better positioned to grow. FPA provides CFP® professionals of all business models and practice focus with a vibrant, active community of professionals who interact through local chapters, events, conferences and virtually through online best practice discussion forums and Knowledge Circles.

For more information on FPA and the benefits of FPA membership www.OneFPA.org

Your Role as a Board Member

First and foremost, you are a board member charged with helping to lead your chapter. Yes, you have taken on membership recruitment, retention and engagement function, but your role in the chapter does not end there. As a board member, you have fiduciary duties that hold you accountable to your FPA Chapter.

Board Roles and Responsibilities

Set Organizational Goals

- Strategic planning
- Determine the chapter's vision and mission
- Operational and annual plans
- Set goals and develop strategies to achieve them

Ensure Necessary Resources

- Retain capable executive leadership
- Ensure adequate financial resources
- Promote positive public image
- Ensure the presence of a responsible board
- Succession planning

Provide Oversight

- Financial oversight
 - Develop a budget and ensure that it aligns with actual financial activity
- Minimize risk exposure
 - Director and Officers (D&O) Liability Insurance is provided through FPA national at a reduced rate
 - General Liability Insurance
- Provide legal and ethical integrity
- Evaluate the executive
- Evaluate itself

Individual Board Member Responsibilities – your fiduciary duties

- Duty of Care - displays a level of competence when making board decision
 - Stay informed and ask questions
- Duty of Loyalty
 - Show undivided allegiance to the welfare of the organization
- Duty of Obedience
 - Stay faithful to the mission of the organization

Sample Position Description

Membership (Engagement) Director

Monthly Time Commitment: 10 hours; includes monthly board and committee meetings

Key Responsibilities:

- To develop (with board participation and approval) annual, measurable goals for the chapter and strategies to drive member engagement including onboarding new members, acknowledging participation and tenure of current members and engaging prospective members in learning more about FPA.
- To ensure strategies integrate touches that complement FPA headquarters' outreach to members.
- To develop and lead a Membership Engagement committee for the chapter that will implement strategies through micro-volunteering or longer term volunteering to promote FPA membership and deliver the greatest value to the chapter's members.
- To serve as a key resource and expert for all of the chapter's volunteer leaders and chapter's members about membership including understanding opportunities for individual and firm membership, membership categories, dues, benefits at the national and chapter levels, how to join and how to renew.
- To track with the help of the chapter executive or administrator, key metrics to identify membership trends and ensure membership success towards goals including the chapter's member retention, new members recruited, and lapsing members.
- To attend chapter board meetings, support the efforts of other board members and attend chapter programs and activities.
- To collaborate with all of the chapter's volunteer leaders to ensure all programs and services the chapter offers are in service of the member maximizing the value of their membership.
- To act as key contact along with committee members to welcome new members, provide customer service for current members and encourage reinstatement of lapsed members with a special emphasis on ensuring members know the benefits of FPA membership and how to fully access and utilize them to maximize the value of their membership.
- To connect with Membership Directors in other FPA chapters both in person at the Chapter Leaders Conference and in online communities to share best practices in support of FPA's overall success.
- To Attend FPA headquarters' Chapter Leader monthly training meetings the third Thursday of each month at 1 pm EST. (Note: Calls are recorded for flexibility in listening/viewing.)
- To help manage the list of current members by encouraging that members maintain complete and current MyFPA member profiles at OneFPA.org
- To encourage the participation of your chapter in growing the FPA member community through the FPA Member-Get-A-Member program which rewards the member referrer and prospective member referee.

- To ensure that the value of membership is focus when setting pricing for chapter events and programs and creating exclusive member opportunities.
- To facilitate your chapter leadership's thoughtful discussion of and vote on the selection of your chapter dues for the CFP® Professional and Allied Professional membership categories for submission to FPA headquarters each year in October.
- To provide valuable and inclusive opportunities for members to network and connect locally with one another both educationally and socially.
- To seek to diversify membership through the active engagement of younger planners, more diverse planners and those new to the profession.
- Participate in the organization's governance.
- Work on committees and task forces, as necessary.
- Be an ambassador of FPA and the chapter.

Recruitment

One of the keys to successful growth is on-going recruitment of new members into the FPA community. The following section identifies FPA recruitment outreach by FPA headquarters and key recruitment strategies your chapter is uniquely positioned to employ locally.

Target Audiences

In keeping with FPA's strategic directive adopted in 2012 - *To be the recognized and unquestioned professional membership resource and advocate for CFP® professionals by embracing the concept of "one profession/one designation" as our sole business directive and policy filter* - there is an emphasis on the recruitment and engagement of our core audience, CFP® professionals. Within this audience, FPA recognizes the importance of actively engaging targeted segments that include newly certified CFP® professionals, NexGen, new to profession, and more diverse financial advisors to reflect the dynamically changing profession of financial planning. Because FPA serves as a key professional membership association for all of the financial planning profession, it seeks to additionally engage the larger financial planning community.

Lists used to accomplish this include:

- **External Lists**

- **CFP® Professionals** – FPA headquarters and the CFP Board have a Memorandum of Understanding that provides FPA with various mailing lists sent to a third party mail house. Audience includes CFP® professionals, newly certified CFP® professionals as well as those registered to sit for the CFP® Exam.
- **FPA SmartBrief** – Delivers a weekly snapshot of the financial planning community with news from the *Journal of Financial Planning* and other leading sources, written by expert editors to keep current without having to sift through the news every day. (https://www2.smartbrief.com/signupSystem/subscribe.action?pageSequence=1&briefName=fpa&campaign=subcat_WealthManagement)
- **3rd Party Database** – FPA headquarters utilizes a 3rd party database to market to non-member registered representatives and registered investment adviser professionals. This outside provider provides us with unlimited list usage (during the contract period) to market membership.

- **Internal Lists**

- **Current, Lapsed and Prospective FPA Members** – FPA headquarters maintains a database that includes member and non-member records. These include both CFP® and nonCFP® professionals. NonCFP individuals includes students, nonCFP financial planners and other "Allied Professionals" for whom financial planning is not their primary specialty. Types of professionals in this group include:
 - Accountants
 - Estate Planners and Attorneys
 - Real Estate and Mortgage Professionals
 - Insurance Professionals
 - Trust and Bank Managers
 - Family Wealth Counselors and Business Consultants

- Chapters have access to their chapter's lists of current, lapsed and prospective members via the Chapter Management Tool at:
<https://www.onefpa.org/MyFPA/Pages/ChapterManagementTool.aspx>
- **Firms** – Firm membership options means that both larger and smaller firms are actively recruited. Additionally, within current member firms, there are opportunities to recruit individual members. Visit <https://membership.onefpa.org/financial-advisor-options> for a current list of larger Classic Partner firm members. For a list of smaller Group member firms, contact FPA headquarters.

Options for Enrolling Members

Members can join and renew online at www.OneFPA.org through the mail (7635 E. Hampden Avenue, #600, Denver, CO 80231) and by phone. There are also two programs to help facilitate easier management of a member's annual renewal:

- **Auto-Renewal Program**
 - Enables member to auto-renew their membership annually by providing a credit card.
 - One-time discount offered of \$50 when signing up (can't be combined with any other discount or offer).
 - Offer not valid for Full-time Student category members or members participating in the Monthly Dues Installment program.
 - 33% of members currently participating in the program.

GO GREEN
Get some green.

Make this your last paper bill.
Sign up for auto-renewal today.

Reduce your carbon footprint
and receive \$50 off
your next membership renewal.*

RenewFPA.org
Enter promo code:
AUTORNW

* Offer not valid for Full-time Student category members or members participating in the Monthly Dues Installment Program. \$50 savings not valid with any other offer, promotion or discount.

- **Monthly Dues Installment (MDI) Program**
 - Member must commit to a one year membership.
 - Splits dues payment into 12 equal monthly payments.
 - Only available for CFP® Professional and Allied Professional categories.

FPA Headquarters Recruitment Campaigns

- **Colleague Referral Program: Member-Get-A-Member (MGAM)**
 - To participate in this program, current members must refer a new member to FPA. When this prospect member joins FPA as a paying member, both the referring member AND the referred member receive money towards their dues renewal.
 - \$25 off the referring member's membership dues for every CFP® Professional and Allied Professional category member.
 - Referred member also receives \$25 off dues if joining as a CFP® Professional or Allied Professional.
 - \$10 off the referring member's membership dues for every Faculty, CFP Certificant or CFP Candidate category member.
 - Referred member also receives \$10 off dues if joining as a Faculty, CFP Certificant or CFP Candidate.
 - Students, International and Member Emeritus categories are not eligible for referral discounts.
 - Learn more at <https://membership.onefpa.org/MGAM>
- **CFP® Professionals Campaigns**
 - **New CFP® Professionals:** Each month FPA headquarters receives a list of new CFP® professionals from the CFP® Board of Standards that is delivered to a third-party bonded mail-house. FPA headquarters mails an invitation to join to each monthly list a maximum of three times.
 - **Non-Member CFP® Professionals:** FPA headquarters receives a list of current CFP® professionals who have opted-in to FPA communications from the CFP Board of Standards. This list is utilized to market FPA to non-member CFP® professionals.
 - **CFP® Test Takers:** FPA headquarters purchases a one-time use list of the candidates registered to sit for their CFP® certification examination three times annually. Through this list, FPA headquarters has a one-time opportunity to reach out to these individuals through a third-party bonded mail-house. The marketing is in the form of a letter.
- **Recruitment campaigns targeted to Allied Professionals in financial services industry**
 - Encouraging non-financial planner professionals that work with financial planners to participate in FPA activities.
- **Recruitment Campaigns Targeted to Group Membership**
 - On-going outreach targeting smaller firms in FPA's database
 - Email campaigns utilizing 3rd party database prospects
- **Recruitment Campaigns Targeted to Classic Partner Firm Members**
 - Outreach through key contacts at firms to encourage enrollment by firm planners as individual FPA members.

Create a Recruitment Strategy for Your Chapter

1. **Set Goals.** Do you know your chapter's recruitment trends? Has your overall membership been increasing? Before recruitment begins, ensure you have a plan for how your chapter will integrate onboarding touches that complement the onboarding FPA headquarters does. See page 19 on Onboarding.
2. **Recruit your Member Engagement Team.** You can't do it alone. Engage other chapter leaders and members in joining with you to grow your membership.
3. **Identify Target Audiences.** See page 10 for an overview of lists.
4. **Know the Categories and Benefits of FPA Membership.** See page 33 for a list of all categories and page 54 for benefits. Ensure your chapter leadership and Member Engagement team are also well versed in the categories and benefits of FPA membership.
5. **Leverage Your Unique Opportunity for a Peer to Peer Approach.** One of the greatest strengths of FPA chapters in recruitment is the ability of your chapter leaders to speak to prospective members from the vantage of being a financial planner and an FPA member.
 - One of the most effective strategies in recruitment are member testimonials – the why I joined and why I'm currently a member.
 - Don't underestimate the power of a personal invitation to join. When members are asked why they join, many respond that they were invited by a colleague or peer.
 - Remember, it's not the menu of offerings, but the relationships that drive the decision to join and decision to engage. Focus on creating connections and activities that build community.
6. **Tap Into Your Sources for Prospects.** FPA headquarters does regular outreach to prospective members to educate them about FPA and the benefits of membership to encourage joining. To complement these efforts, chapters can do local outreach using the prospect lists available on your Chapter Dashboard in the Chapter Leadership Tools & Resources section on OneFPA.org

 Outreach can include phone calls, social media, emails or mailers. Invite non-members to be your guest for a chapter meeting or event so they experience the benefits of being a member first-hand. Use the tools and resources available at [Value of FPA Membership resource page](#) to help you communicate the value of FPA membership.
7. **Hitting the Hot Buttons.** When speaking with a prospective member, ask questions and listen for which of the three motivators is their current hot button. Hot buttons generally fall into one of these three categories:

- AN ANSWER to a question or a need ...need might be low-cost education, or helping solving a business issue.
- A PERSON ... need connections; maybe a mentor, a coach, for a new job, an employee, a vendor connection, or a friend.
- A PURPOSE ... something to get involved in and people to get involved with.

Sample Questions:

- What is something you are working on that's got you excited?
- What kind of projects are you working on at the office?
- What drove you to get into this profession?
- What would you like to know about us?
- What's one thing you'd like the organization to help you with within the next couple of months?
- Is there anyone or any type of person you'd like us to connect you with?

Help the prospective member map their membership. Seek to give them three ways they can tap the organization to meet their immediate needs:

- A Person ... someone in the organization that shares their interest or could assist them with the issue or question.
- Activity ... something they can get involved in which addresses their need or interest, e.g. your blog, an online community, a group activity or event. It is good to have a ready list of small tasks that a prospect can get involved to suggest – this begins to cultivate their “inner volunteer.”
- A Resource ... an accessible (and think free or low-cost) information source, e.g. toolkit, white paper, series of articles, video on demand, or file library.

8. **Know Who Your Members Are.** When recruiting, it's important to be able to articulate to a prospective member who the community is they'll be joining. Learn about the composition and demographics of your chapter's membership through the reports available on your Chapter Dashboard
9. **Leverage Opportunities within Firms.** FPA's firm membership programs to recruit members offer targeted ways to recruit members within firms. FPA's Classic Partner program for larger firms and FPA's Group Membership program for smaller firms both provide 15% savings on individual FPA membership enrollment and renewal in addition to a host of benefits.
10. **Encourage Participation in the Member-Get-A-Member Program.** Through the FPA Member-Get-A-Member program, current members can invite a colleague to join using the online submission form at <https://membership.onefpa.org/member-get-a-member>. FPA headquarters emails an invitation of membership to the prospect. The member saves \$25 on their dues renewal for each

referral who becomes a CFP® Professional or Allied Professional member and \$10 for each Faculty, CFP® Certificant or CFP® Candidate member who joins. If members accrue multiple referral rewards, the program can pay for the cost of their membership renewal in full. See page 58 for more about this program.

11. **Apply Best Practices.** When developing your recruitment strategy, be sure to apply best practices like:
 - Ensure any programs your chapter charges fees for include member and non-member pricing or are exclusively for members to motivate joining.
 - Follow up with an invitation to join to all non-member event attendees.
 - Make sure your chapter website provides a clear and current membership invitation and an easy path to join.
 - Maximize the opportunity for recruitment at any industry or university events your chapter participates in by having membership information available.
 - Lapsed FPA members are also a source for recruitment. Re-engage lapsed FPA members by letting them know they're missed, soliciting their feedback on their membership experience and inviting them to rejoin as a member.
 - Reach out to the team at FPA headquarters for questions, training and to share your successes.
12. **Be Consistent.** Map out regular, monthly recruitment outreach and track your success against your annual goals. At the end of year of service as Membership Director, make sure you have a succession plan and train the chapter's incoming Membership Director.

Value Proposition Materials

FPA highlights two tools or resources for FPA chapters which are sent to chapter leaders in a “MyFPA” email each month. These items are available on the [Value of FPA Membership resource page](#) which provides timely information, news, strategies and resources to support your chapter in sharing the FPA value proposition to both current and prospective members.

In this section of the FPA website, you'll find member testimonials, videos, flyers, PowerPoint presentations and more. Have a need or idea for a new item? Reach out to FPA headquarters to let us know.

Video: FPA Member and NexGen 2014 President, Andrew Sivertsen cFP®, speaking about the value of FPA membership.

Flyer: AUGUST 2015 Your Membership Advantage. FPA FINANCIAL PLANNING ASSOCIATION.

Brochure: Enhance your professional knowledge, grow your business, advocate for your profession and connect with your peers. FPA has everything you need to succeed. FPA IS YOUR ONE CONNECTION™ TO:

- 24,000+ PROFESSIONAL MEMBERS
- JOURNAL OF FINANCIAL PLANNING
- ADVANTAGE PROGRAM
- NETWORKING OPPORTUNITIES
- DEVELOPMENT
- KNOWLEDGE

Table: Get to Know Your FPA

	PROFESSIONAL DEVELOPMENT (Expand Your Knowledge)	COMMUNITY (Expand Your Connections)
Journal of Financial Planning	Receive digital and print versions of the award-winning Journal of Financial Planning, featuring timely articles, research, and analysis. Access to the online archive is available to members. (Available only to members.)	
FPA Webinars	Receive professional and continuing education credits through live and on-demand high-quality webinars. (Available only to members.)	
FPA Annual Conference	Attend the award-winning, engaging, high-quality CFP® conference and take home practical knowledge and insights to implement immediately in your practice.	
FPA Retreat	Relax and recharge at the FPA National Retreat, an exclusive leadership retreat for members. (Available only to members.)	
FPA State Meet	Relax and recharge at the FPA State Meet, an exclusive leadership retreat for members. (Available only to members.)	
Financial Services Review	Access the latest in financial and capital markets in a practical format of management, analysis, and action-oriented planning, including: investment, retirement, insurance, and more. (Available only to members.)	
FPA Mentoring	Help and guidance in your professional life is available through FPA's mentoring program. (Available only to members.)	
FPA Chapters	Expand your network through FPA's supported activities: chapters, networks, and state associations. (Available only to members.)	
FPA Connect	Meet regularly with your peers through FPA's Connect program. (Available only to members.)	
FPA Knowledge Online	Access the award-winning FPA Knowledge Online program. (Available only to members.)	
Member	Connect to the values of your profession. FPA's member network enables members to advocate for the profession, share their expertise, and connect with their peers. (Available only to members.)	

Not an FPA Member? Join Today by Visiting OneFPA.org or call 800.322.4237 x2

FPA branded items are available for purchase from American Solutions for Business through the [FPA Store](#).

The FPA Store can be used for all of your FPA branded merchandise needs including:

- Totes
- Bags
- Backpacks
- Water bottles
- Travel mugs
- Portfolios
- Journals
- Pens
- Magnets
- Mints
- Lip balm
- USB flash drives
- Web keys
- Computer and desk accessories
- Pins
- Badges
- Buttons
- Lanyards
- Tradeshow giveaways
- Convention banners and signs
- Awards
- Executive gifts

Additionally, FPA booth displays including Geometrix display and table drape are available in the store. The display is localizable by chapter and compact for carrying.

To receive special FPA chapter pricing on your order, contact:

American Solutions for Business

FPAStore.com

ASBPromoStore.com

Cara Signorelli - csignorelli@americanbus.com

Phone 303.798.6448

Onboarding, Retention and Recapturing Members

Membership recruitment and membership onboarding and retention go hand-in-hand. Onboarding and retention is equally as important as recruitment efforts. Renewal dues income comprises the majority of revenue and retaining current members is more cost effective than recruiting new members. Members too that have a positive experience and find value in FPA help create a thriving and dynamic community. Their word-of-mouth recommendation of membership can motivate others to join. In this section, FPA headquarters' strategies are outlined with suggestions for how your chapter can complement those touches.

Onboarding and Retaining Members

FPA headquarters' onboarding is designed to get new members engaged early in their member experience. The following outlines the touches a new FPA member receives with suggested ways your chapter can incorporate complementary touches.

New Members

1. **Immediately:** Confirmation page providing temporary login and password
2. **Immediately:** Printable email receipt within confirmation page
3. **Immediately:** Automatic Receipt Emailed (same receipt as available within confirmation page)
4. **Within First 24 Hours:** Welcome to FPA – Get Started Email (automated series in Informz) – 1 in a series of 5 emails deployed over the first 3 months of membership pointing to the [Member Welcome webpage](#) and spotlighting member benefits
5. **Within 24 hours:** New member receives an automated email through Higher Logic with an invitation to check out FPA Connect
6. **Within First Week:** FPA chapter can reach out to new members using reports on the [Chapter Leadership Tools & Resources](#) page to personally welcome member and help them connect to a person, activity, or resource that fulfills their “hot button” for why they joined FPA.
7. **In First Month of Membership:**
 - a. Tip on first issue of *Journal of Financial Planning* with *Welcome from FPA*
 - b. New member welcome call made by BrightKey (2 attempts, 3 attempts made if Chapter is part of the ChapterConnect Program. ChapterConnect Program enables FPA chapters to put information about upcoming programs and events into an online portal BrightKey accesses to integrate into their script. BrightKey also provides any chapter specific feedback or questions for the chapter on this portal.)
 - i. To participate in ChapterConnect, chapter leaders should log into the ChapterConnect platform and fill out the information form to include contact information, an announcement to members, and up to 4 events with name, date, title and a short description. This should be reviewed/updated monthly.
 - c. For renewing members, FPA headquarters send certificates to acknowledge member longevity for those who have been members for 5, 10, 15+ years.
8. **At Six Months of Membership:** Six month check in call made by BrightKey (2 attempts, 3 attempts if Chapter is part of ChapterConnect Program). On this call, new members are asked if they are active in their FPA chapter. If they aren't, BrightKey invites them to attend an upcoming chapter meeting or event using the information FPA chapters participating in ChapterConnect provide via the online portal.
 - a. Following the 6 month check in call from BrightKey, FPA Chapters can use this information to additionally follow up with the new member to get them engaged.

FPA Chapter Best Practices:

- Form a Member Engagement Committee or Task Force and assign each committee member to call a new member.

- Welcome new members at FPA chapter meetings or in your FPA chapter newsletter if you have one.
- Assign your Member Engagement Committee or Task Force to “mentor” a new member to help them learn how to navigate all of the benefits of membership and network within your chapter community. The mentor can call their “mentee” using the following talking points:
 - Welcome to the chapter.
 - Invite to the next meeting.
 - Inform of upcoming events (symposiums, networking opportunities, etc.).
 - Invite to join committees.
 - Direct them to the chapter website.
 - Give them your contact information in case they need anything.
 - Thank them for joining FPA.
- Hold a new member orientation as a stand-alone event or as a pre or post event to an FPA chapter meeting to walk new members through the benefits of membership.
- Send new and renewing members a member certificate. A template is available on the [Membership Value Proposition](#) page.
- Educate members about benefits at each meeting, in chapter emails and on the chapter website. Resources to support doing this are available on the [Membership Value Proposition](#) page.
- Encourage members to keep their MyFPA member profile updated so FPA has a current and complete profile for them. Members can also manage their communication preferences and print a copy of their membership card in their profile.

Renewing Members

A member’s annual renewal date is based on the anniversary of their join date. A member can receive up to a total 12 possible touches from FPA headquarters to encourage renewal of their FPA membership. Professional membership associations with retention rates of 80% or greater have a best practice of sending minimally 8 touches in the renewal series. The following details the current renewal series and provides best practices for your FPA chapter to implement complementary touches.

- **90 Days Prior to Membership Renewal Date:**
 - FPA members who have successfully referred prospective members that joined through the Member-Get-A-Member Program are emailed a promotion code for the rewards they’ve earned so they can apply this towards their dues renewal amount.
 - Renew Email (automated)
 - Sent on 7th of the month
 - 1st Renewal invoice (mailed)
 - Current member profiles are now printed on the back of the invoice to encourage members to provide a current and complete profile.
 - Mailed on the 3rd of the month

- **60 Days Prior to Membership Renewal Date:**

- Auto-renewal program participants – 60 day reminder
 - a. Your credit card on file has expired or is no longer valid, please update
- 2nd Renewal email (automated)
- 2nd Renewal invoice (mailed)
- FPA Member Advantage Program (MAP) partner, Ryan Insurance reaches out to insurance policy holders to remind them an active FPA membership is required to keep their insurance coverage.
- Ryan Insurance also reaches out to members completing their first year of membership to let them know they are eligible to enroll in FPA Term Life Insurance (members have 60 days after the anniversary of their first year of membership to enroll).

- **30 Days Prior to Membership Renewal Date:**

- Auto-renewal program – 30 day reminder
 - a. Email: FPA membership will be automatically renewed with credit card on file OR
 - b. Your credit card on file has expired or is no longer valid, please update
 - c. If card not updated, or if on third Tuesday of the month the card was declined:
 - A. Member will get an email from the Member Engagement Team stating their credit card on file has been declined, point them to member profile to update information
 - B. If no update, Member Engagement Team Member will call within 24-48 hours of email
 - C. Second email sent if still no response
 - D. If still no response, the first week of the following month, Member Engagement will send an invoice in the mail
 - E. Suspended/lapsed members will be manually opted out of the auto-renew program and lapsed series will begin
- 3rd Renewal invoice (mailed)
- 1st Due to Renew Call from BrightKey (2-3 attempts)
- *This is Your Last Issue* JFP Wrap
- Members who are part of the Monthly Dues Installment (MDI) program receive an email from the Membership Team letting them know their membership is up for renewal, what their dues renewal amount is, and that their credit card on file will continue to be charged in monthly installments.
 - a. This is a manual email
- FPA Chapters can reach out to members who are due to renew to personally thank them for their membership and let them know the chapter is looking forward to their continued participation.
- *Note: Members considered Suspended 1-60 days post due to renew date, if renew during this period, maintain original join date*

11. One Week Prior to Membership Renewal Date:

- Renewal email (automated)
- 2nd Due to Renew Call from BrightKey (1 attempt)

13. Day of (membership expires today):

- Renewal email (automated)

Recommended Chapter Best Practices:

- Encourage enrollment in FPA's Auto-renewal Program which eliminates invoicing. Member receives \$50 savings on dues in the first year they enroll.
- Encourage members to refer new members through FPA's [Member Get a Member program](#) to help build the FPA community and get rewarded with savings on their dues renewal.
- Acknowledge milestones and thank your member volunteers.
- Give members opportunities to provide feedback during the year on things like the types of programs they'd like participate in.
- Know and track your chapter retention rate to watch for trends and to understand who is joining, renewing and lapsing.
- Encourage first-year members to get engaged to increase first-year retention.
- If your chapter has events with fees, make it beneficial to be an FPA member.
- Educate members about benefits at each meeting, in chapter emails and on the chapter website.
- Encourage members to keep a complete and updated member profile so they maximize the benefits of membership.

Lapsed Series

Special attention should be given to reactivating a member as soon as their membership has lapsed. The longer a member is lapsed, the more challenging it may become to motivate their rejoining. The following details the current series of touches FPA headquarters deploys to recapture lapsed members. You'll also see some recommended best practices for your FPA chapter to implement complementary touches.

1. One Week Lapsed:

- 3rd Due to Renew Call from BrightKey (2-3 attempts)
- Email: Your FPA Membership Has Expired (automated)

2. One Month Lapsed:

- Email: Your Forgot Something (automated)

3. Two Months Lapsed:

- Email: Make FPA Your One Connection™ Again (automated)

- FPA chapter can reach out for feedback on why the FPA member is not renewing either through a personal call, email or survey.
- *Note: Status for members who are more than 60 days past their due to renew date are defined as inactive. If they pay their dues at this time, their join date is reset (these would be “rejoins”) and they start over for longevity purposes.*

4. Three Months Lapsed:

- Lapsed member call from BrightKey (3 attempts)
- FPA chapter can reach out with an invitation to attend an FPA chapter event

5. Four Months Lapsed:

- Email: The Power of Membership (automated)

6. Five Months Lapsed:

- Email: What Does FPA Membership Mean to You? (automated)

7. Six Months Lapsed:

- Email: We Miss You (automated)

8. Seven Months Lapsed and Beyond:

- Members who still have not renewed are included in lapsed member versions of recruitment emails and mailings
- *Note: Member count reporting ‘resets’ someone after 3 years of being lapsed so they no longer look like a rejoin, but are considered a new member.*

Recommended Chapter Best Practices:

- As a courtesy, reach out with a personal email or phone call when a member’s membership lapses to ensure they don’t need assistance in some way.
- Let lapsed members know they’re missed.
- If the member intentionally let their membership lapsed, find out why.
- Re-engage FPA members by starting the membership life cycle again to reintroduce them to FPA and the value of membership.

All of these programs can be tied to chapter meetings, by setting aside time to welcome new members and discuss one of the many benefits that FPA has to offer. By providing consistent communications to members they will more easily remember and take advantage of all the resources available to them.

Engaging Members

Engaged members are those who participate and feel like they are getting tangible value through their membership and that their participation is recognized and appreciated. The following section discusses opportunities to encourage membership engagement and open communication.

Engagement: Getting Members Involved

Engaged members are loyal advocates for your chapter. The best way to encourage engagement among members is to generate excitement around potential opportunities for participation. One of the top questions asked of FPA staff is, “**How can I get members to participate?**” The following list outlines various opportunities for participation, which will play a key role in keeping your members active and consistently renewing.

- **Financial Planning Week™** - Financial Planning Week is the first full week in October each year. During this week, help the public discover the value of financial planning through media, legislative initiatives and volunteerism, and public awareness events. Select activities that fit your chapter’s size and capabilities and conduct them during Financial Planning Week. It’s a great way to get members involved in a national initiative.
- **Advocacy Days** - FPA Advocacy Day is an important opportunity for FPA members and leaders to gather on The Hill to continue the dialogue with federal policymakers about our profession while displaying FPA's strength as the association for all CFP® professionals. Participating empowers members to positively interact with policymakers to help advocate for issues that are important to practitioners of the financial planning community. State Advocacy Days help members connect with local legislators and regulators to build important relationships that help influence the right people. Learn more at <https://www.onefpa.org/advocacy/Pages/Advocacy-Day.aspx>
- **Chapter events** - Chapter events are integral to the member’s impression of FPA. Make them something members look forward to attending. Extend personal invitations, thank members for coming, ask for feedback about the event and invite them to get involved with an upcoming event.
- **Pro Bono** - Members can give back to their communities by offering pro bono financial planning services through partner organizations to people in need. Services include educational materials, seminars and workshops, and consultations for qualified individuals or families. If you don’t already offer pro bono opportunities, this is a great program designed to get your members involved. Visit <http://www.onefpa.org/advocacy/Pages/FPAPublicService.aspx> for more information.
- **Mentorship** - Mentoring students is more than just an opportunity to get involved, it’s a chance to ensure the future of the financial planning industry. Find out what universities are in your area. You can work with your chapter to develop career days, and invite students to join chapter meetings and plan networking events.
- **Knowledge Circles** are gathering places for like-minded members who want to engage in dialogue about best practices and innovations on particular topics. Knowledge Circle participants also serve as content experts who help guide the creation of FPA content and educational programs. Current [Knowledge Circles](#) are: [Business Success](#), [Estate Planning](#), [International/Cross-Border](#), [Investment Planning](#), [Retirement Planning](#), [Tax Planning and Tax Strategies](#), [Theory in Practice \(Academic/Practitioner\)](#) and [Women and Finance](#).

- **FPA publications** - There are numerous opportunities for members to contribute to FPA publications. Members can contribute articles to the *Journal of Financial Planning*. If an article is selected, it may qualify for CE credit, the member will be published and will also gain the opportunity to be invited to become a speaker. As a chapter, this is a great opportunity to encourage members to become involved with FPA. If a member gets published, recognize them at meetings and do something special to celebrate their success. To contact the *Journal* go to <http://www.onefpa.org/journal/Pages/default.aspx>
- **Volunteer Engagement Program** - FPA's volunteer structure enables a great number of members to contribute to FPA and the profession in meaningful ways that fit their life/business. Whether it is a short, one-time commitment, or a long-term project/position – FPA welcomes the skills, talents and passions of all our members. We seek to engage with a wide number of volunteers in varying capacities through this program. For program details visit <http://www.onefpa.org/community/Pages/Volunteer.aspx>
- **Social Networking:** Members tend to group themselves according to their stage in career, client-base, education needs, age or various other needs. As a chapter, why not facilitate such groups to encourage collaboration, networking and information sharing? With that in mind, FPA created FPA Connect, an online forum where members can network with other FPA members from all over the world and engage in discussions relevant to them. Visit <http://connect.onefpa.org/home>.
- **Communities of Interest:** FPA also has over 20 online communities that your members may want to join. Visit <http://www.onefpa.org/community/Pages/Communities-of-Interest.aspx> to learn more.
 - **International** A group of planners and educators from around the world that gather to learn from each other and share their life experiences. The International community strives to:
 - Support, advise and encourage one another through professional development.
 - Share best practices on topics of group interest, including cross-border planning.
 - Share resources, ideas and knowledge to help strengthen and promote financial planning.
 - **Master Planners** An informal group of experienced financial planners who desire to provide support for future generations of financial planners. The rule of thumb for participation is referred to as the 50, 15, 5 Rule. A member must be 50 years old, have at least 15 years' experience in financial planning and be committed to engaging in at least 5 acts of mentoring every year.
 - **MPACT:** Mid-Profession And Career Transition (MPACT) is a community of planners who are passionate about elevating the standards of professional practice and championing the transference of responsibility to the next generation. Typical members have at least 5 years of experience in a leadership role in the financial planning industry, or 10 years of full time experience prior to entering the financial planning profession.
 - **NexGen:** A unique community for up-and-coming planners (age 36 and under) who represent the future of the financial planning profession. NexGen provides members with a network that serves to:

- Support, advise, and encourage one another in professional advancement.
- Promote, foster, and direct programs that aid in passing the baton.
- Explore issues common to younger planners and seek means of accentuating the positives and finding resolutions for the negatives.
- **Women and Finance:** A gathering of female FPA members who want to discuss how to leverage their strengths as planners and learn from each other on how best to serve women clients.

On-going Member Communications

Consistent and integrated communication is key to educating members about what’s happening in FPA. The following outlines key communications FPA headquarters sends to all members.

- **Monthly:**
 - MyFPA email - All members with email who have not opted out of email communication receive a monthly “MyFPA email”. The email spotlights what’s new and trending at FPA and how to maximize your benefits.
 - A chapter version is also sent to all chapter leaders with strategies and links to resources for FPA chapters to additionally communicate the value of membership. These items can be found on the [Membership Value Proposition](#) page for chapters.
 - *Journal of Financial Planning* – FPA members are mailed monthly issues of the Journal in addition to being emailed a digital version of the current issue. Each issue of the *Journal* includes ads that promote the value of FPA membership by spotlighting different member benefits.
- **Quarterly:**
 - All Member Virtual Update calls held quarterly. FPA members are invited to a quick 30-minute call each quarter for their insider’s view into exciting new happenings at their professional home. Recordings from previous calls can be accessed on the [All Member Virtual Update](#) webpage.
- **On-going:**
 - Variety of FPA emails including:
 - Weekly & monthly Webinar reminders, invitations to events & conferences, and surveys
 - FPA Annual Report - https://www.onefpa.org/Membership/Pages/FPA_Annual_Report.aspx
 - FPA Connect – FPA’s compliance-friendly online community
 - FPA SmartBrief (if they subscribe)

Members can set their communication preferences in their MyFPA member profile at OneFPA.org. With so much competing content in the marketplace, it is important that your messages be concise and relevant to your audience. Email is often scanned, not read thoroughly, so your design and messaging should reflect this reality. Suggestions for when to send email communications and some quick tips on creating content include:

- **Upcoming events.** What are the key benefits of attending the event? Encourage sharing and include a call to action (i.e. “Sign up Now”)
- **Follow up on recent events via email.** Ask people who recently attended a chapter event for their thoughts about content, location, time, length of meeting, etc.
- **Call for volunteers.** Is it time to begin recruiting volunteers for chapter committees? Emailing members as a first step could get the momentum going for you.
- **Time to renew reminders.** In conjunction with headquarters’ efforts, send your members an email 30 days prior to their due to renew date. Thank them for their membership, ask for feedback and remind them to renew on time to preserve their longevity year accumulation at FPA.
- **Thank you for renewing email.** After your members renew their membership, send them a personal email thanking them for their continued support of FPA. Invite them to join a committee, and tell them you look forward to seeing them at the next chapter event.
- **Surveys.** It’s been shown that respondents are more likely to reveal truthful information online rather than in-person. Periodically survey chapter members to receive feedback on your activities and measure overall engagement.
- **Telephone Communications:** Nothing beats the value of speaking with a person over the phone or in person. The key to these calls is to make them valuable, yet concise. In order to ensure your objectives are met during phone calls, keep a list of talking points on hand. Don’t expect to cover more than three talking points during a call, and try to keep the call to less than five minutes unless the member is really engaged. When on the phone, be flexible – don’t feel obligated to make sure every single talking point is checked off in order – but refer back to the talking points to make sure you’re accomplishing the goal of your call. You’ll find that not only will members begin to recognize your voice and name, but they will also seek you out at chapter meetings for discussion – a great side benefit to calling members!
 - **Yearly check-in call.** Call your members annually to ask how their membership is going. Thank them for their membership and ask if their needs are being met. Invite them to volunteer on a committee and remind them of significant dates for chapter events.
 - **Renewal call.** Call your members before their membership lapses to remind them to renew. When calling members remind them of some high points from the past year, as well as some of the new benefits that were introduced. As always, thank them for their support.
 - **Lapsed member call.** When a member lets their membership lapse, call them the following month to remind them to renew. If they aren’t planning to renew find out why. Develop a method to tabulate reasons members don’t renew so that you can track trends.

- **Special event invite.** Does your chapter have a significant event coming up? Personally inviting members via phone can boost your attendance numbers. Be sure to offer to register them over the phone if possible.
- **Newsletters:** Whether you produce an electronic or paper newsletter, this medium is a great way to keep members informed about what's going on at FPA. Be sure to include a calendar of upcoming events, chapter information, and updates from FPA headquarters. In the journalism world they have one piece of advice for writers: keep it simple. Keep articles short (five paragraphs maximum) and concise. Don't overload the document with graphics. And keep your medium in mind – if it's a paper newsletter think about how gray tones or complicated graphics will photocopy, if it's electronic think about what words will catch in spam filters and how complicated graphics won't download appropriately.
- **Chapter Website:** Your chapter should have a presence on the Internet. This site serves as the clearinghouse of information about the chapter. As with other communications, keep it simple. Navigating a website should be intuitive for the visitor. Think about where you expect to find navigation buttons on a site, and give your visitors the same experience. A stale website is one that is not regularly used, so be sure to update the website frequently. As an extension of FPA headquarters, your website should reflect a consistent FPA image. FPA branding guidelines and regulations can be referenced online in the resources in the FPA Connect community for Membership Directors. Any questions regarding your chapter's website should be directed to Deb Baker on FPA's Marketing team at DMiller@OneFPA.org

*Be aware of, and comply with, [CAN-SPAM regulations](#). Always honor opt-outs and communication preferences. Review CAN-SPAM laws at <http://business.ftc.gov/documents/bus61-can-spam-act-compliance-guide-business>.

Recognizing and Rewarding Members

Recognizing member is a great way to express appreciation and recognition of a member's participation in the FPA community. Having multiple recognition touches over the tenure of membership can help strengthen a member's commitment to FPA.

To make members feel special and appreciated in effort to increase satisfaction with membership and encourage a long membership tenure, FPA headquarters sends members special recognition certificates for milestone anniversary dates (Every 5 years. Ex. 5, 10, 15, 20, etc).

Chapters are encouraged to build on this program and recognize the member locally as well. Opportunities include:

- **Recognition in a chapter newsletter.**
- **Holding an annual Member Appreciation Event** to recognize all "milestone" members each year or all members. These events can be used to thank members for their membership, and remind them of the multitude of benefits available to them.

- **Presenting a certificate or award** during a chapter meeting. Sending the member a special card recognizing and congratulating them on achieving a “milestone” year. To welcome new members and recognizing annually renewing members, a membership certificate template is available to chapters on the Value Proposition page of tools and resources <https://www.onefpa.org/MyFPA/MyChapter/Pages/MembershipValue>
- **Member Referral Campaigns:** The campaigns aren’t just about recruiting members. They are a great way to rally your members towards a common goal. Set chapter-specific goals and activities around the programs. The feeling of camaraderie and friendly competition will keep your members engaged. Remember to actively reward and recognize top performers in your chapter!
- **Personalized Greeting Cards:** Whether for their birthday, celebration of a holiday or the anniversary of their join date, sending members a personalized card shows that you care about them.
- **Membership Orientations:** These events are not reserved for new members. On an annual basis, organize an event where you remind members of all of the benefits available at FPA. Use the FPA Fact Sheet in the General Resources section as your script.
- **Spoil New Members:** We’ve all been there, attending events as a new person is sometimes difficult. The quicker you make a new member feel comfortable the more likely you are to retain them. In addition to the welcome communications discussed in Communicating With New Members, here are some more ideas:
 - Pair new members with a buddy for their first chapter meeting.
 - Pay for the new member’s meal at their first meeting/event.
 - Recognize the new member at your meeting. Welcome them in your newsletter and on your website.
 - Give new members a sticker or ribbon on their name tag. Make it part of your chapter’s culture to seek out new members to make them feel welcome.
 - Provide opportunities to volunteer with the chapter.
 - Conduct New Member Orientations. This can be a cocktail reception, breakfast or a special session before the regular chapter meeting. Invite new members to these regularly-scheduled events to welcome them and acquaint them with all the membership benefits available to them.

Updating Member Profiles

A complete and current member profile helps members maximize the value of their FPA membership. Members can manage their member profile by logging in at onefpa.org and clicking on My Profile in the upper right hand corner. Encourage your chapter's members to update and complete their profiles annually, more frequently if they have changes to their work or contact information.

Additionally, a member's current member profile is included on the back of their mailed membership renewal notice so they can fill in information and return by mail or go online to update their profile on their own.

From their My Profile, members can:

- Set communication preferences
- Provide demographic information; education, licenses and certifications; general contact information
- Print their membership card

From their My FYP dashboard, members can:

- Manage their CE
- Link to member benefits like their FPA chapter, FPA Connect, the Member Advantage Program and Professional Development.
- View leads from FPA PlannerSearch.

MyProfile

Username: [blank] Membership Type: STAFF Membership ID: 430131 Member Since: 9/6/2016 Valid Thru: 12/31/2099

[Change Username](#) [Change Password](#)

[Print Membership Card](#) [Renew](#) [Automatic Renewal](#)

Navigation Tabs:

- General Information
- My Communication Preferences**
- Demographic Information
- Professional Information
- Education, Licenses, Certifications
- Submit

My Communication Preferences

I want to opt-out of the following Financial Planning Association communications:

- ☐ FPA Membership Benefits, News & Updates
- ☐ Professional Development
- ☐ Surveys
- ☐ Offers That May Be of Interest to Me
- ☐ FPA Member Directory

My preferences for receiving FPA Connect communications are as follows:
Opt.In Opt.Out

Member Operations

This section contains general information about your chapter's member related operations including membership categories and dues.

Membership Information

FPA HQ is responsible for renewal notices, recruitment efforts and dues collection. All member information is maintained within FPA's iMIS database. Members cannot join a chapter without joining FPA HQ. Members receive one invoice for FPA membership that reflects a single dues amount that incorporates both headquarters and chapter dues. A member is affiliated with a chapter based on their zip code. FPA headquarters can assist members who wish to be affiliated with a different chapter. FPA's board has set chapter dues for all membership categories EXCEPT Allied Professional and CFP® Professional categories. Each year, the chapter board should vote on dues for these two categories and submit dues to FPA by October 15.

Member Dues

Membership Category	FPA Dues	Chapter Dues	Total Invoiced
CFP® Professional	\$375	Set by chapter	Depends on chapter dues
CFP® Candidate	\$150	\$49	\$199
CFP® Certificant Student	\$89	\$30	\$119
Full-time Student	\$24	\$15	\$39
Allied Professional	\$299	Set by chapter	Depends on chapter dues
Faculty	\$150	\$49	\$199
International CFP® Professional	\$149	n/a	\$149
Member Emeritus	\$112	\$37	\$149

Member Type

CFP® Professional (PRAC)	A CFP® professional who actively practices or supports financial planning.
Allied Professional (PRO)	For professionals who deliver personal financial services to the public and may use the financial planning process in their work and professionals who work directly with financial planners to support their practice of financial planning and/or their delivery of financial planning services to the public. (Not a CFP® certificant.)
Faculty (EDU)	An academic who teaches full-time in a CFP Board-registered degree program, certificate program or a related

finance/business high school or degree program with the ultimate interest of supporting students who wish to pursue financial planning as a career.

CFP® Certificant (STC)

An individual enrolled in a CFP Board certificate program with a plan of pursuing a career as a CFP® professional. Members may only hold this membership type for a maximum of 2 years.

CFP® Candidate (PRACD)

A candidate for CFP® certification who has passed the CFP Board Certification Exam and is working on the experience requirement. Available until CFP® certification is attained. Members may only hold this membership type for a maximum of 3 years.

**Full-time Student (STD)
(graduate or undergraduate)**

An individual enrolled in a full-time graduate or undergraduate finance or business registered or related degree program with a plan of pursuing a financial planning career. Members may only hold this membership type for a maximum of 4 years.

International (INT)

A professional who practices in the financial planning profession and currently resides outside the United States.

**Member Emeritus (RET)
(retired)**

Available for members who have reached full retirement age (as defined by SSA) and, if employed as a business professional, work less than an average of 20 hours per week calculated on an annual basis.

Chapter Reports

FPA provides chapter leaders access to chapter specific membership reports online. Individuals must be identified as a chapter leader in FPA's database to access the reports. You must be logged in to access the reports. The URL for the chapter leader tools and resources page is

<https://www.onefpa.org/MyFPA/MyChapter/Pages/ToolsResourcesChapterLeaders.aspx>.

The reports available include:

- Real time reports
 - All members
 - New members
 - Renewals
 - Prospective members
 - Chapter profile

- Change log
- Historical reports
 - Membership by month
 - Total member counts
 - Membership activity

Definitions

New member	Join date during the report month with no dues transaction in the last three years.
Rejoin	Join date during the report month with a prior dues transaction in the past three years. The member count reporting resets someone after three years so looks like a new member.
Renewal	Dues payment prior to the paid thru date – has renewed early or on time
Reinstate	Dues payment within the 60 day grace period. Someone who was suspended, but paid within 60 days of expiration date.
Active = A	
Prospect = P	
Suspended = S	
Inactive = I	

FPA Resources

In this section you'll find additional information and key FPA resources to support your chapter and you in your Membership role.

Summary of Chapter Tools and Resources

FPA works with its network of chapters to provide members with One Connection™ to tools and resources for professional education, business success, advocacy and community through a variety of services and benefits.

Advocacy Support

FPA advocacy staff engages Advocacy Directors with a monthly newsletter and conference call to facilitate the sharing of successes and update leaders on federal and state issues that affect the financial planning profession. As states engage in issues that align with our policy lens, staff provides direct advocacy assistance to local chapters in the form of advocacy days with their state legislatures. Personalized survey data is shared with chapters and states including members who are willing to advocate on behalf of their profession. In addition, chapters and states have access to an online State Advocacy Toolkit to help with advocacy. FPA advocacy also maintains a grassroots platform which enables members to identify their policymakers and communicate with them on important issues.

Chapter Dues Collection

FPA HQ collects assessments on behalf of chapters and redistributes funds accordingly via automatic deposit to the chapter's bank account each month.

Chapter Best Practices

Chapters are educated on best practices for program development, leadership planning, and membership recruitment and retention through a variety of FPA resources including articles, FPA website, Chapter Leadership community, Chapter Leaders Conference, and recorded webinars.

Chapter Leaders Conference

The FPA Chapter Leaders Conference brings together chapter board members and directors from across the country for education and networking specifically designed to support volunteers in their roles as FPA Chapter Leaders. This conference is held each year in November in the Denver Metropolitan Area. There is also a session devoted to chapter executives.

Conference Discount and Chapter Rebate

FPA HQ provides chapters a promo code that offers their members discounts on FPA conferences. Additionally, chapters receive a rebate for each member who uses the promo code to register. Marketing toolkits for each event are also available to help chapters with promotional efforts. The toolkit includes web banners (7 sizes), high-resolution newsletter ads, meeting flyer/application, a PowerPoint slide, HTML email templates, social media tips, and an incentive letter.

Chapter Membership Reports

FPA manages a centralized database (iMIS) that produces vital membership information and is available to chapters via OneFPA.org. Chapters are able to download a variety of reports about their membership including date-range reporting, membership history reports, a chapter membership profile report and member change report.

Chapter Policies and Procedures

FPA provides a manual which contains all FPA's policies and procedures related to running a chapter.

Chapter Rebroadcasting Program

FPA has a robust library of content that you can rebroadcast to your chapter, including an ethics webinar created and accepted under CFP Board Ethics program guidelines. Rebroadcast these webinars at a low cost - an affordable, convenient solution to providing education at a chapter meeting. There is also an option to offer Mini-BE at the chapter level.

Chapter Visits

FPA chapters may invite staff leaders or FPA board members to participate in a number of activities including board meetings, chapter meetings or conferences or strategic planning sessions.

Consumer Oriented Articles (COAs)

Chapter public relations directors and chapter executives receive COAs as a tool to help promote FPA and the financial planning process. The articles are distributed during the first full week of each month. Chapter public relations directors are encouraged to provide these articles to local media outlets in whole or in part as story ideas, otherwise known as "pitching."

Professional Association Staff

Dedicated association management staff, with 30+ years of experience, to assist chapters with governance, strategic planning, and operational questions.

Directors & Officers Liability Insurance

Chapters are automatically covered by FPA's insurance policy at a substantially reduced rate to the chapter.

Diversity Toolkit

Educational content created by the FPA Diversity Committee to provide chapters with content they can deliver to members regarding diversity in the workforce, the profession, and their clients.

Financial Planning Days

Financial Planning Days is an effort designed to help thousands of Americans with their financial planning needs via a series of free clinics in cities nationwide. FPA chapters are supported in their efforts to host Financial Planning Day events through FPA and its partners - CFP Board, Foundation for Financial Planning, and The U.S. Conference of Mayors.

Educational Programming

FPA offers “Programs in a Box” - educational programs (including an ethics program) that are pre-approved for continued education credit through the CFP board.

FPA Connect

Chapters receive a dedicated community on FPA’s online networking platform to communicate with chapter members and create document libraries. Chapters are also able to set up private communities for their board and/or committees to use for communication, planning and shared document storage. These communities are available at no charge to chapters. Additional, chapter leaders have access to the chapter leader community on Connect where they can share resources and can pose questions to their peer community at any time. There is also an extensive library of resources on topics pertinent to chapter leaders

Logo Usage and Branding

FPA provides all chapters with uniform logo and branding resources, as well as templates for newsletters and other communication collateral.

Media Training and Opportunities

FPA provides chapters with an opportunity to host media training sessions – in-person and virtual – to help members across the country learn how to effectively work with journalists. The 90-minute trainings are interactive and allow chapters to develop a local base of members who can represent the association. Every CFP® member of FPA that attends an FPA-approved media training can take part in the FPA Media Query System that connects journalists with financial planners.

Membership Recruitment and Retention

Through the membership dashboard, chapters have access to membership data, prospect lists, and member demographic profiles. Chapters also receive access to results of the FPA’s annual Member Loyalty survey. Membership marketing collateral available to chapters includes localizable membership brochures, folders, sample recruitment and retention letters, suggested chapter touches for integrating with FPA National’s retention efforts, member testimonial videos, branded items, member benefit PowerPoint, and an online portal to provide information on upcoming chapter events to be included in new member welcome phone calls made by BrightKey.

MyChapter

This new section of OneFPA.org is largely focused on delivering timely information and resources to FPA chapter leaders. MyChapter includes a Chapter Membership Dashboard, Quick Links, Announcements, MyChapter Calendar and resources organized by chapter leader role.

Pro Bono Support

FPA partners with the Foundation for Financial Planning on FPA’s pro bono outreach activities. Together, FPA and the Foundation work with local FPA chapters to reach underserved populations while providing ongoing guidance and support to chapter leaders and members for pro bono financial planning outreach activities.

Public Relations Support

FPA is committed to supporting chapters as they engage in public relations programming at the local level. Public relations staff at FPA conduct bi-monthly webinars for chapter public relations directors to help them understand the nuances of public relations and how to structure an effective, impactful program. Besides webinars and individual coaching calls with public relations directors, FPA provides resources, including the 50 PR Tactics for FPA Chapters – NOW! guide.

Student and New Professional Program

The goal of this program is to establish FPA as the indisputable home for the next generation of CFP® professionals. Educational content is available that provides chapters with instructions on how to offer FPA MentorMatch and host an FPA Career Day. The FPA University Partner Program is also available to help chapters build student communities at local universities. In addition, FPA NexGen hosts its annual NexGen Gathering each year to support young professionals and invites chapter leaders to quarterly meetings to help chapters form FPA NexGen communities.

Take 5

FPA provides chapters with a monthly communication on timely news and programs taking place in the organization to help chapters communicate with members. Each “Take 5” entry can easily be extracted and used in chapter communications and on chapter websites to engage members and help showcase the value members receive from their affiliation in FPA.

Tax Exempt Status

As extensions of FPA, chapters are included as a subordinate under FPA’s non-profit, tax-exempt status. By inclusion in the group exemption, FPA chapters do not have to go through the process of being designated a 501(c)(6) organization by the IRS.

Technology Options

FPA chapters can benefit from the WordPress FPA hosted website option.

Volunteer Engagement Center

Visit us online to access content focused on helping FPA volunteers thrive personally, professionally during their service. Resources include tools, templates, tools, tips and tactics aimed at helping volunteers of all stages succeed in their position.

Specific Resources That Can Support Your Membership Efforts

FPA provides many resources to help you with your role. You must be logged in to access resources on OneFPA.org. For help with your login, you can contact FPA's Member Engagement team at 800.322.4237, or by emailing MemberServices@OneFPA.org.

- **Monthly Training** – Join us on Adobe Connect the third Thursday of each month for chapter leader training <http://fpa.adobeconnect.com/chaptercall/>; conference call: 866-210-1669 - passcode 4295971#. Calls are recorded and archived on the Chapter Leadership Connection community on [FPA Connect](#).
- **Chapter Reports** can be accessed on the Chapter Dashboard online at OneFPA.org at <https://www.onefpa.org/MyFPA/Pages/ChapterManagementTool.aspx#>. Access to these reports is set up for two of your chapter leaders each year.
- **Chapter Leadership Community** on FPA Connect - <https://connect.onefpa.org/home>
- **Membership Value-Proposition Tools and Resources** can be found at <https://www.onefpa.org/MyFPA/MyChapter/Pages/MembershipValue.aspx>
- Information about the annual **OneFPA Chapter Leaders Conference** can be found at <https://www.onefpa.org/clc>

Planning Templates

Planning ahead improves keeps everyone focused on common goals and improves your chances for success. The following templates are shared to aid you in your planning process.

Planning for a Successful Year

The chapter board should have a discussion about goals for the year. Working as a board to develop membership goals will help direct the allocation of resources including your overall budget, volunteers, and your time. Before you begin mapping out your recruitment, retention, communication and engagement strategies, you will need to understand the chapter's overall goals and objectives for the year.

Highly successful chapters report spending time planning and setting their annual goals before jumping into their recruitment and retention activities.

Start Planning:

1. **Identify your chapter's current strengths:**
 - a. Are you growing each year?
 - b. Do more than 80% of your members renew each year?
 - c. Do your members report feeling 'connected' and appreciated? Do you actively recognize your leaders so they feel appreciated? Do you encourage member activity and

participation on a monthly basis (are members attending events, volunteering for roles, etc.)?

2. Identify your chapter's current weaknesses:

- a. Are your recruitment efforts not resulting in many new members?
- b. Are you seeing an increase in lapsed members?
- c. Are your communication efforts reaching your members? Do members feel 'connected'?

3. Dig into the reasons for each strength or weakness

4. Identify ways to mold your weaknesses into strengths and turn strengths into opportunities.

Example:

Strength: Our chapter has grown by approximately 20% each year since 2012.

Reasoning: *We have focused our efforts on those new to the profession and put money into recruitment efforts for those entering the field. We are actively recruiting local CFP exam candidates and hosting luncheons for young professionals. We are connected to the young community, which allows us to recruit large numbers of young individuals and also keep them for several years.*

Weakness: Our chapter meetings and events attendance numbers decreased by 30% this past year.

Reasoning: *Our members did not have ample time to prepare or plan to attend. Our event calendar was not clearly shared, and dates often changed at the last minute. We also did not offer a strong incentive to attend meetings, though in the past we have offered various incentive options for attendance.*

Turning weaknesses into strengths and creating strategies that build on opportunities:

We should plan our chapter events and meetings in greater advance to capture a larger attendance. We could add an incentive for attending meetings. We should heavily involve a greater number of our young professionals who make up a majority of our engaged members by incorporating young professional programming to draw those individuals to the meetings and events.

Set Goals and Create A Budget:

- SMART goal setting can set your team up for success
 - **S** – Specific: this answers the five 'W' questions: who, what, when, where, why
 - **M** – Measureable: this answers the questions of 'how much' or 'how many' or 'how will I know when this is accomplished?'
 - **A** – Attainable: this answers the question of how this goal will be attained

- **R** – Relevant: ensures that the goal is in-line with the organization’s overall goals and is something that makes sense for your team to tackle
- **T** – Time-bound: puts a date and time on your goal – answers the question of ‘when?’

When feasible, attempt to **determine your budget** prior to beginning your recruitment and retention planning sessions. The budget will be discussed with your fellow board members before moving forward in the planning process.

Building Your Committee:

Don’t go it alone! Build a membership committee composed of positive volunteers with a can-do attitude. Set clear expectations for your committee members, including an accurate projection of time required to fulfill committee obligations throughout the year. If your chapter does not already do so, consider implementing multi-year terms along with a succession plan for your membership director role. These two tactics will dramatically improve the consistency of the knowledge that is passed along from year to year.

Get Started:

Once you’ve built your membership committee and outlined your goals and objectives for the year, it is time to start delegating the work.

Use this document to guide your recruitment and retention activities. Refer to FPA’s website, FPA Value Proposition Page, FPA Connect, and other chapter leaders as a resource for building a strong membership plan for 2017.

After you’ve outlined your various recruitment, retention, communication and engagement activities for the year, start filling in your **Plan of Work**.



I Am a Chapter Membership Director How Do I Get Started?

JANUARY

- ☐ Identify membership engagement or micro-volunteering (short term) opportunities for chapter leaders and members to team up with you on in the year ahead. There are many benefits to using a membership committee to help throughout the year. The committee members could help greet or hand out name badges at events, call members to introduce them to the chapter or call lapsed or expiring members. Having a committee in place also makes it easier to identify the next membership director or other volunteer positions. It is also a great way to get members involved in the chapter. An engaged member is a renewing member.
- ☐ Get acquainted with the membership reports and lists available on your Chapter Dashboard located at <https://www.onefpa.org/MyFPA/Pages/ChapterManagementTool.aspx>.
- ☐ Set up a call to meet your Membership Team at FPA headquarters who can help you understand trends and determine strategies to achieve our goals.
- ☐ Mark your calendar to attend FPA monthly chapter leadership training on the third Thursday of each month which will provide continued information and learning. <http://fpa.adobeconnect.com/chaptercall/>; 866-210-1669 - passcode 4295971
- ☐ Enter task here
- ☐ Enter task here
- ☐ Enter task here

FEBRUARY

- ☐ Ask for time on this month's board meeting agenda to talk about and identify benefits that your fellow board members value.
- ☐ Based on your chapter's membership trends, set objectives for the year ahead like increasing new members or focusing on stronger onboarding of new members.
- ☐ Set up tracking to support your goals so you can measure your success.
- ☐ Your Membership Team at FPA headquarters can also introduce you to key tools, resources and information like ways to integrate your chapter touches with FPA headquarters' member outreach, registering for ChapterConnect which incorporates information about

upcoming chapter events into new member welcome calls and value proposition tools and resources.

- ☐ Enter task here
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- ☐ Enter task here

MARCH

- ☐ Get familiar with the [categories](#) and [benefits](#) of FPA membership so you can connect current and prospective members to benefits that speak to their hot buttons (unique needs and wants).
- ☐ Set a plan to remind chapter members about their benefits at chapter events and meetings using the [Value Proposition](#) resources available.
- ☐ Enter task here
- ☐ Enter task here
- ☐ Enter task here

APRIL

- ☐ Get to know your members better. Encourage board members to attend events and connect with a minimum number of chapter members.
- ☐ Look at your membership composition. Using these insights, target engagement opportunities and benefits that match the profile of your members.
- ☐ Encourage your members to update and complete their [MyFPA Member profile](#) to maximize the value of their membership.
- ☐ Enter task here
- ☐ Enter task here
- ☐ Enter task here

MAY

- ☐ Ask for time on this month's board meeting agenda to begin conversations about your chapter's dues selection for the CFP® Professional and Allied Professional membership categories for 2018. Selection of dues must be submitted by **October 15, 2017**.
- ☐ Enter task here
- ☐ Enter task here
- ☐ Enter task here

JUNE

- ☐ Reach out to other Chapter Membership Directors and leaders on the FPA Connect community – [Chapter Leadership Connection](#) – for ideas about what’s working at other chapters and tap into the experience and learning of your peers.
- ☐ Start thinking about the succession plan and who can fill board positions for next year. Your chapter executive will likely be able to help you identify potential volunteers.
- ☐ Enter task here
- ☐ Enter task here
- ☐ Enter task here

JULY

- ☐ You’re just past the half year mark for your year as Membership Director. You and the rest of the chapter board might consider the following questions: Based on your on-going tracking, are you meeting your goals? Are you identifying any new trends that might require pivoting your strategies? Create opportunities to get feedback from new, active and lapsed members to understand their membership experience. Short email surveys, calls or simply a quick one-on-one conversation can provide tremendous insights and help members feel heard.
- ☐ Enter task here
- ☐ Enter task here
- ☐ Enter task here

AUGUST

- ☐ Leverage programs like FPA’s Member Get a Member to create incentives and energy within your chapter to grow FPA membership. The power of referrals is harnessed through this program which rewards FPA members for recommending new members who join. The new member receives special one-time savings on their first-year dues as well.
- ☐ Collect [member testimonials](#) from active chapter members to help educate and illustrate the benefits of membership.
- ☐ Enter task here
- ☐ Enter task here
- ☐ Enter task here

SEPTEMBER

- ☐ Grow your chapter’s membership by tapping into firm focused membership options. Individual members who work for FPA Gold level [Institutional Members](#) are eligible for a 15% discount on dues when joining and renewing. Familiarize yourself with Institutional members in your area. Learn more about FPA’s [Group Membership](#) program geared toward

smaller firms. Group Membership also provides savings on individual membership and registration for FPA events and conferences.

- ☐ Enter task here
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- ☐ Enter task here

OCTOBER

- ☐ Submit your chapter's dues selection for the CFP® Professional and Allied Professional membership categories for 2018 by **October 15, 2017**.
- ☐ Remind members about the value of membership? Benefits like the [Member Advantage Program](#) can provide savings that more than pay for the cost of dues.
- ☐ Encourage members to attend quarterly [All Member Virtual Updates](#) for a quick 30-minute insider's view into exciting happenings at FPA.
- ☐ Enter task here
- ☐ Enter task here
- ☐ Enter task here

NOVEMBER

- ☐ If you haven't already, start your succession plan for your chapter's next incoming Membership Director. Share your experience from the past year and make sure the incoming Membership Director registers to attend the OneFPA Chapter Leaders Conference.
- ☐ Enter task here
- ☐ Enter task here
- ☐ Enter task here

DECEMBER

- ☐ Review the past year and help set goals for the year ahead based on identified strengths, areas to further strengthen, learning and challenges.
- ☐ Thank all of the volunteers who have supported your chapter's membership efforts, the close of the year offers a great opportunity to thank members for their participation and choosing FPA as their professional association.
- ☐ Enter task here
- ☐ Enter task here

Group Membership

FPA Group Membership is an easy and efficient way for firms with 300 or fewer employees to manage multiple individual FPA memberships through one centralized point. Group membership offers a single consolidated invoice, and discounts.

When you enroll as an FPA Group Member, your firm will benefit from discounted access to FPA membership and national conferences. You'll also gain access to valuable practice management resources, continuing education and professional development to support your firm's success. Group membership enables firms to streamline managing multiple individual FPA memberships for employees and save with an exclusive 15% off individual membership fees.

Enroll your firm as an FPA Group Member for \$250 annually and receive:

- 15% off individual dues*
- 10% off FPA national conferences (FPA® Annual Conference and FPA Retreat)
- Recognition at FPA Annual Conference
- Reduce administrative paperwork through a single annual invoice for all members of your organization
- Exclusive use of FPA's Group Member logo
- Plus each individual member enrolled will receive all of the benefits of individual FPA membership

Contact an FPA Membership representative by emailing GroupMembership@OneFPA.org or calling (800) 322-4237, Option 2.

*Discounts valid for CFP® Professional and Allied Professional membership categories only. Not valid with any other offer, promotion, or discount.

- Worthwhile for firm to join if enrolling 4 or more advisors as FPA members (average savings per person is \$67.50 with 15% discount) or registering 4 or more FPA Annual Conference attendees (10% off registration, even at early bird pricing of \$799, firm saves \$79 per advisor)
- Current average firm size = 50 or less advisors
- Average number of individual members = 10



FPA Group Membership

JOIN TOGETHER, SAVE TOGETHER, BENEFIT TOGETHER

Financial Planning Association® (FPA®) Group Membership will allow your firm to save and your employees to gain access to the expert resources, advocacy initiatives and networking opportunities they need to succeed.

The Benefits of Group Membership

DEEP DISCOUNTS on membership dues and national conference registrations:

- 15% off individual dues*
- 10% off FPA national conferences

* Discount valid for CFP® Professional and Allied Professional membership dues only. Not valid with any other offer, promotion, or discount.

NATIONAL RECOGNITION and exclusive use of the FPA Group Membership logo

PLUS ALL THE BENEFITS of individual membership for employees who become FPA members

Download your group membership application today!

OneFPA.org/GroupMembership



FPA GROUP MEMBERSHIP

Making Membership Easier



FIRM ENROLLMENT FORM

Thank you for your interest in FPA Group Membership – an easy and efficient way for your office to manage individual FPA memberships through one centralized point. Group membership offers a single consolidated invoice, and discounts.

The firm pays an annual fee of \$250 which provides:

- 15% off individual FPA membership dues *
- 10% off FPA national conferences (FPA Annual Conference and the FPA Retreat)
- Recognition at the FPA Annual Conference
- Use of FPA group member logo
- *Plus all the benefits of individual FPA membership!*

CREATING YOUR FPA GROUP MEMBERSHIP... IN 3 EASY STEPS

Step One:

Complete the first two sections of the Group membership enrollment form, including Group Firm and Group Administrator information. The role of the administrator is to make individual FPA membership updates and to facilitate payment of the consolidated invoice.

Step Two:

Fill out the Member Information section by gathering pertinent information from current FPA members at your office as well as from individuals who would like to join FPA. If possible, please provide the FPA ID# for all current members. For any new members, please indicate the appropriate membership category from the list on the second page.

Step Three:

Send the completed form by mail, fax, or email to the following:



Financial Planning Association
Group Membership
7535 E. Hampden Ave. # 600
Denver, CO 80231



303.759.0749



GroupMembership@OneFPA.org

Once your paper work is received, an invoice will be sent to your administrator for all FPA discounted membership dues in your firm plus the annual \$250 Group Membership fee. Each year, you will receive your firm's Group Membership invoice with the names, FPA ID #'s, and discounted dues rates for all FPA members included in your Group membership account.



Questions?

Please call FPA member engagement at 800.322.4237 option 2

* Discount valid for CFP® Professional and Allied Professional membership dues only. Not valid with any other offer, promotion, or discount.

Classic Partners Membership

Classic Partner firms are larger firms of 300 or more advisors. An overview of this membership option follows. For a listing of all current Classic Partner firm members, go to <https://membership.onefpa.org/financial-advisor-options>. For questions or more information, contact Jeff Yeager on FPA's Corporate Relations team at jyeager@OneFPA.org, 303.867.7153.



2017 CLASSIC PARTNERSHIP PROGRAM

The Classic Partnership Program is the most effective way to present your products, services and expertise to the diverse FPA membership of financial advisers. Not only does Classic Partnership give your company visibility through the FPA exclusive member channels, but it is also the best way to show your company's commitment to financial advisers, financial planning and the financial planning profession.

CLASSIC PARTNER OPPORTUNITY
100 complimentary individual FPA memberships
25% discounted rate on exhibiting opportunities (events, webinars, etc.)
20% discounted rate on Conference Sponsorships (up to \$2,000)
15% discount on additional individual memberships
10% discounted rate on Conference Registrations
Four (4) content submissions for the FPA Educational Library (e.g. whitepaper, blog, video)
Two (2) listings on FPA Job Board
One complimentary digital ad in the Journal of Financial Planning (2 months)
One-time access to FPA membership mailing list
Access to Chapter Leader contact information for additional speaking opportunities
Dedicated local Account Manager

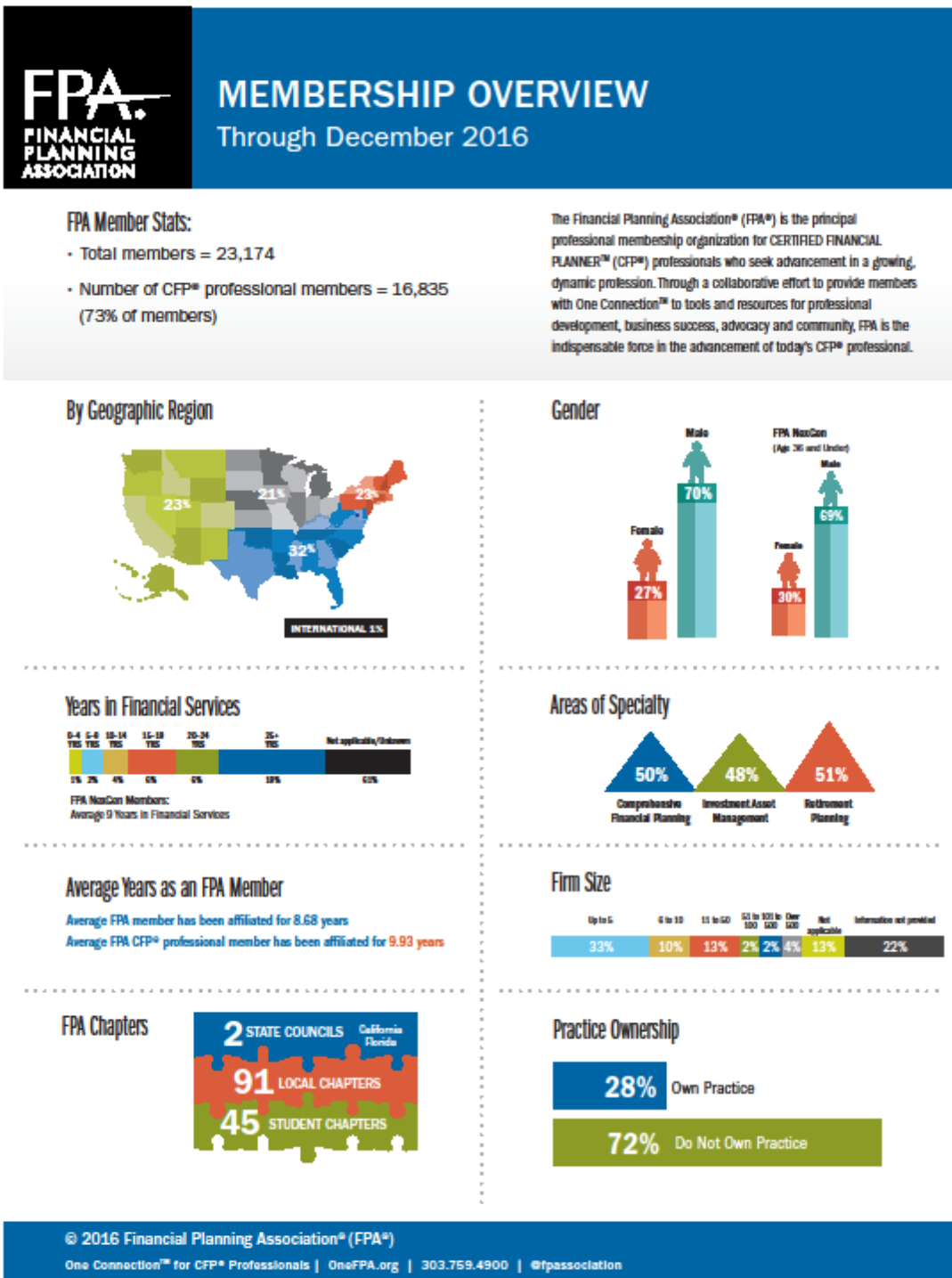
Cost: \$5,000 annually

CLASSIC PARTNERS RECEIVE:

- Opportunity to directly support and positively position your organization with nearly 24,000+ FPA members
- Networking opportunities at the national level along with direct access to local FPA chapters throughout the U.S.
- Exclusive discounts on exhibits, events, webinars, sponsorships, advertising, research and continuing education
- Recognition and visibility with a highly desirable audience of financial services professionals
- Access to online educational opportunities, digital and print advertising including the Journal of Financial Planning

For more information on Classic Partnership, please contact CorporateSales@OneFPA.org or call 800.822.4237 Option 5.

FPA Member Demographics



10 Reasons to Be a Member



TOP 10 REASONS

Why FPA is Your One Connection™



1. Innovative Thinking

Get access to current, thought-provoking content, ideas and strategies through your member subscription to the award-winning, peer-reviewed *Journal of Financial Planning* (a \$529 value).



2. Networking with Peers

Learn from a vibrant and active community of professional members from diverse backgrounds, and a wide variety of business and compensation models connecting through local chapters, Knowledge Circles and FPA Connect, a compliance-friendly online community.



3. Savings That More Than Pay for Your Membership

The FPA Member Advantage Program delivers a carefully selected, comprehensive collection of practice management resources, tools and education providers that save you money.



4. Professional Development

Build knowledge with member preferred rates for in-person events, and live and on-demand, high-quality webinars led by seasoned professionals covering today's most relevant challenges and trends through the FPA Professional Development Center.



5. The Latest Trends

Gain a competitive advantage identifying and navigating business gaps with detailed reports and whitepapers from original research on business-centric topics and issues including operations, personnel, human resources, marketing and technology through the FPA Research and Practice Institute™.



6. Continuing Education

Access FREE CE credits annually through current and archived issues of the *Journal of Financial Planning*, the quarterly *Financial Services Review* and six complimentary webinars for CFP® Professional members.



7. A Voice for Protecting Your Profession

FPA gives members a powerful voice on professional standards and potential laws that impact those who provide financial planning services and investment advice.



8. Tools for Business Success

Tools like the FPA Job Board, FPA PlannerSearch® and FPA MediaSource provide you opportunities to elevate professionally and ensure you thrive and reach your greatest potential.



9. Advancing the Profession

Volunteer leaders and FPA chapters across the country are working to advance and increase visibility for the profession you love through educational programming, public outreach and pro bono financial planning services. FPA is also home to the next generation of financial planners—FPA NexGen—a community of younger professionals age 36 years and under.



10. Belonging Supports Your Success

Being a member of your profession's association home identifies you as someone who is serious about your profession as well as purposeful about staying informed.

Renew your membership today at RenewFPA.org or by calling 800.322.4237 x2

Overview of FPA Member Benefits



Get to Know Your FPA

Rely on FPA as your expert resource for what you need to thrive professionally. Here's how FPA membership provides the benefits and resources that support your success.

PROFESSIONAL DEVELOPMENT Elevate Your Knowledge		MEMBER BENEFIT	MEMBER SAVINGS
Professional Development Center	Learn your way through this online portal for continuing education including webinars, live events, career development opportunities and peer-to-peer knowledge exchange forums.	✓	
Journal of Financial Planning	Receive digital and hard copy editions of the FPA award-winning, peer-reviewed Journal for the best current thinking, innovative, thought-provoking content, ideas and strategies plus continuing education credit with access to searchable archives. Download editions with the JFP app.		\$529
FPA Webinars	Increase your skillset and earn continuing education credit through live and on-demand webinars. CFP® Professional category members receive 6 FREE webinars annually.		50%
Journal in the Round	Participate in lively, monthly roundtables with Journal writers and contributors who illuminate, discuss and debate the thinking behind articles followed by Q & A about the issues from members' perspectives by FPA Knowledge Circle hosts.	✓	
FPA Annual Conference	Attend the largest gathering of CFP® professionals and thought leaders in financial planning for take home practical knowledge and strategies for immediate implementation in your practice.		\$200
FPA Retreat	Recharge and deepen your practice at this FPA gathering of top leaders, thinkers, and planners delivering in-depth learning with the potential to alter the course of your career and the profession.		\$200
FPA SmartBrief	Subscribe to this weekly digest of the latest in the profession, including news, policy updates and the trends in practice management.	✓	
Financial Services Review	Access the latest theoretical and empirical research through digital editions of Financial Services Review, a quarterly peer-reviewed journal co-published by the Academy of Financial Services and FPA. CE in each issue.	✓	
FPA Residency	Jump start your career in this experiential 6-day in-residence program. If you are eligible to sit for the CFP® Certification Examination, are a new or soon-to-be CFP® professional, build experience in real financial planning scenarios and establish mentor relationships with preeminent thought leaders.		\$500-\$600
COMMUNITY Expand Your Connections		MEMBER BENEFIT	MEMBER SAVINGS
FPA Chapters	Expand your connections through FPA's unparalleled nationwide chapters. Network and share ideas with colleagues and participate in local educational programs, events and leadership opportunities.	✓	
FPA Connect	Interact virtually with peers on FPA Connect, the compliance-friendly online community forum to get the answers and support you seek without losing valuable time.	✓	
FPA Knowledge Circles	Learn from your colleagues through hosted dynamic online communities that enable like-minded members to engage in innovative and best practice conversations on specific topics.	✓	
Volunteer	Volunteer your skills, talents and passion in support of financial planning through meaningful, one-time commitment or long-term projects/positions available at national and chapter levels.	✓	

BUSINESS SUCCESS Energize and Grow Your Business		MEMBER BENEFIT	MEMBER SAVINGS
FPA PlannerSearch®	Connect with consumers through this online search tool for CFP® professionals. (Eligibility requirements apply.)	✓	
FPA Member Advantage Program	Access a comprehensive collection of member-only discounts on industry-leading consultants, top-notch education providers, first-class insurance plans, and best-of-breed software and technology from firms selected to help you take your practice to the next level. Savings on these essential business tools and resources can more than cover the cost of your annual dues.	✓	✓
FPA Research and Practice Institute™ (RPI)	Gain a competitive advantage through original research on business-centric topics and issues, including operations, personnel, human resources, marketing and technology. Detailed analysis, reports, whitepapers and resources, based on the research, will help you identify your business gaps and address them.	✓	
FPA Practice Management Blog	Run your business more efficiently, effectively and profitably with the latest insights and strategies from CFP® professionals and practice management experts.	✓	
FPA Job Board	Explore career opportunities through confidential online resume posting, automated weekly e-mail notification of new job listings and the ability to save jobs for later review. Employers and recruiters can search a large pool of applicants through targeted access to the nation's most qualified financial planning talent pool.	✓	
Media Training	Learn the essentials of working with journalists through your FPA chapter or organization-wide virtual trainings including how to pitch story ideas to reporters, what you need to do to prepare for interviews, how you can improve interview performance and tactics for ensuring you maintain a great reputation with reporters.	✓	
FPA MediaSource	Be a part of the unique media query system for CFP® professionals that connects journalists with FPA members on personal finance and financial planning stories. Queries are sent electronically to qualified CFP® professional members who attend an FPA-approved media training.	✓	
FPA MentorMatch	Gain best practices and tips from experts, or volunteer to share your expertise in this program designed to connect emerging leaders with seasoned professionals to foster professional development while giving back to the profession.	✓	
Magazine Subscription	Receive with a monthly subscription to Money magazine plus access to the Money digital edition.	✓	
FPA Professional Services Directory	Connect to fellow members who support the financial planning process through this directory accessible on FPA Connect.	✓	
FPA Group Membership	Support the success of your smaller firm by enrolling in this program delivering all of the benefits of individual membership along with special savings on individual membership dues* and national conferences. Firms pay with one, streamlined invoice. *Savings applicable to FPA CFP® and Allied Professional memberships only.		✓
ADVOCACY Protect Your Profession		MEMBER BENEFIT	MEMBER SAVINGS
Advocacy Toolkit	Access sample letters, templates, tips and tactics for connecting with your state and federal units of government.	✓	
Advocacy Days	FPA Advocacy Days in Washington, D.C. and State Advocacy Days provide hands-on training, branded folders, badges and position leave behinds, a pre-event webinar, and the option of an advocacy team member to lead you through your first effort.	✓	
Financial Planning Coalition	FPA's role in the Financial Planning Coalition provides you with a powerful voice in Washington D.C. on joint policy positions and gives more direct access to policymakers on behalf of FPA members. Research and data driven projects help persuade public policy decisions on issues that advance your profession.	✓	
FPA Political Action Committee (FPA-PAC)	FPA-PAC, the only registered PAC on Capitol Hill, represents financial planners and financial planning building valuable relationships with candidates, providing access to leaders who share your concerns and educating policymakers.	✓	
FPA Engage Platform	Find your elected state and federal officials with one click, and get up to speed with news and policy information that affects our profession.	✓	
FPA Member Advocacy Council (MAC)	FPA provides you a powerful, influential voice on matters stemming from the regulatory bodies that impact you and your business. The MAC solicits member input on the functions and activities of those bodies to develop positions and action items that give you a more powerful voice.	✓	

Renew your FPA membership today by visiting RenewFPA.org or call 800.322.4237 x2

What Does FPA Membership Mean to You?



What Does FPA Membership Mean to You?

Your membership in the Financial Planning Association® (FPA®) makes a powerful statement about you. It identifies you as a financial planner who is serious about your profession as well as purposeful about staying informed, educated and involved. FPA membership provides you with the benefits and resources you need to succeed.



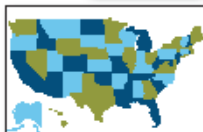
Valuable, Relevant Resources and Tools

Successful professionals rely on FPA for practice management tools and access to members-only resources and research reports. Browse OneFPA.org which is full of articles and resources on a variety of topics available to you 24/7.



Publications that Deliver Thought-Provoking Content

Membership includes the award-winning *Journal of Financial Planning*, digital editions of the Academy of Financial Services' *Financial Services Review*, a free subscription to *Bloomberg Businessweek*, *Money Magazine*, and FPA SmartBrief – a weekly digest of the latest news and trends in the profession.



Networking Within the Profession

Financial planners who take the time to meet and learn from their colleagues are better positioned to grow. FPA provides financial planners with a vibrant, active community of professionals who interact through local chapters, events, conferences, virtually through FPA Connect, our online compliance-friendly discussion forums, and FPA Knowledge Circles.



Cutting-edge Training and Development

For financial planners, professional development isn't an option, it's an ongoing necessity. FPA offers more ways to increase your skillset and earn Continuing Education credit by offering diverse educational opportunities throughout the year.



Foundational and Advanced Financial Planning Knowledge

Learn from seasoned professionals as they cover today's most relevant challenges and trends through FPA's live and on-demand webinars, available when most convenient for you with just a click.

Not an FPA member? Join your professional community at OneFPA.org or call 800.322.4237.

BrightKey CHAPTERCONNECT™ Program

This program was developed for the Financial Planning Association with the idea of creating a new member retention program that organizes and harnesses the power of a critical driver of member satisfaction: positive engagement with the local chapter.

Here's how the platform works:

- Each chapter has a personalized URL that takes them to their own ChapterConnect Update page.
- A designated “key contact” updates the page monthly with a brief message or announcement to the new members and a description of up to four upcoming events.
- BrightKey callers have their own “survey” page within ChapterConnect. As part of the call to new members, they click on a link that takes them to the participating chapter's page. Referring to this page, the callers can
 - Deliver the personal message on behalf of the chapter
 - For the welcome call...
 - Find out if the new member recalls being contacted by the local chapter
 - Ask if they intend to become involved in chapter events (if not, why not)
 - Review the upcoming events
 - Provide contact information for the chapter representative
 - Flag questions and issues to be addressed by the local chapter, along with contact information
- The participating FPA Chapters view their page at least on a monthly basis for action items from the previous month's member calls and to update the chapter information
- FPA headquarters' dashboard shows monthly results in the aggregate, with the ability to drill down to the chapter level.
- There is no cost to the chapter to participate in this program.

Here's how the program positively impacts members:

- Increase the consistency of the member experience from chapter to chapter
- Deliver a unified view of membership from headquarters to chapter
- Grassroots effort that maximizes the strengths and defines the role of headquarters and chapter.

To enroll your chapter to participate, contact FPA headquarters.

Member-Get a Member Program

Harness the power of FPA's Member-Get-A Member program. When members successfully refer a new member, both the referring member and the referred member receive savings on their membership dues.

To make a referral, a member fills out contact information on OneFPA.org. FPA HQ staff then sends the prospective member an invitation to join FPA with a discount code they can use on their membership dues. Upon successfully joining, the referring member receives a coupon code to use on his/her dues renewal when it's time to renew.

More information is available at <https://membership.onefpa.org/member-get-a-member>.

Member-Get-a-Member Program

Refer New Members. Save on Dues.

Share the Rewards of Membership

Invite a colleague to join the Financial Planning Association® (FPA®) and **save \$25 on your dues renewal** for each referral who becomes a CFP® Professional or Allied Professional member and \$10 for each Faculty, CFP® Certificant or CFP® Candidate member who joins.*

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Johna Olio - Executive Assistant & Office Manager

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Heather Caldwell - Operations & Staff

Engagement

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