Planners Talking Planning

FAQ

FPA's Knowledge Circles are gathering places for likeminded members who want to engage in dialogue about best practices and innovations on particular topics. As these communities continue to evolve into rich areas of knowledge and access to content experts, the Knowledge Circles will help guide the development of FPA articles, resources and educational programs.

What Knowledge Circles are in place right now?
Five Knowledge Circles have launched so far. They are:

- Business Success (practice growth, management and transition)
- Estate Planning
- International/Cross-Border
- Investment Planning
- Retirement Planning & Social Security Optimization

Which ones are still to come? When will they launch?

Risk Planning and Tax Planning are expected to launch in the spring.

Where do these groups live?
They can be found on FPA Connect. Go here to sign up.

How will they be different from communities already in place on FPA Connect?
Current FPA Connect communities are mainly limited to online discussion forums. The Knowledge Circles are multi-faceted, including phone calls and in-person meetings.

How do I sign up?
Go here to sign up for the knowledge circles we have already launched (see list above).

What do Knowledge Circle Hosts Do?
Each Knowledge Circle will have between one and three hosts. These hosts are FPA volunteers

and tremendously important to the future success of the Knowledge Circles program.

Hosts have two core responsibilities. They will draw information into their respective Knowledge Circle to help get conversations started. They will also draw information out of the Knowledge Circle to help in the development of FPA articles, conference sessions and webinars. Interested in becoming a host? Go here to learn more.

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How will the communities gather?
This is up to each Knowledge Circle to decide. All communities will have a discussion forum for online conversation, resource library and directory of participants in place. Other potential ways to gather could include conference calls, screen share webinars, online chats or in-person meetings.

I want to help get the tax planning and/or risk planning groups get started.
Great! Prior to launch, each Knowledge Circle will have a specialized group of passionate members who will gather for one or two hour-long conference calls. During this time, they will work through and coalesce around an agreed upon focus and vision of the community. See the exploratory questions here.

Once the Knowledge Circle has this clarity, it will launch. This is an open call for participants. All are welcome. Send an email here with an explanation of which Knowledge Circle you are interested in.

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I still have questions.
We would love to hear from you. Please send an email here.

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