

Annual Report 2017



SUPPORTING AND ELEVATING THE FINANCIAL PLANNING COMMUNITY



Thank You FPA Members

As a member of the Financial Planning Association® (FPA®), you know that your individual impact is a critically important component in what we can do as a collective. Together, the combined difference our members make powers not only the continued growth of your professional membership organization, but also the advancement of the financial planning profession. The 2017 Annual Report is your exclusive snapshot of the progress we made through a wide range of activities and initiatives throughout the year, as well as a look forward to 2018 and beyond. We hope that you take a moment to celebrate the successes of 2017, knowing that through our shared work, the best is yet to come. Thank you for leading by example in supporting the transformative power of financial planning, and for choosing to be a part of the FPA community.

Table of Contents

Letter from the 2017 FPA President	4
Letter from the Executive Director/CEO	5
About the Financial Planning Association	6
Focus on the CFP® Professional	8
Remembering an Icon	11
2017 FPA Award Winners	13
National FPA Leadership in 2017	15
FPA Chapter Network	18
Supporting Our Members	25
Professional Education	27
Business Support	31
Advocacy	33
Community	37
Corporate Partners	40
2016/17 Financial Report	43



Letter From the 2017 FPA President

2017 will go down in history as a year when the Financial Planning Association® (FPA®) made significant progress in realizing its mission of being the unquestioned resource and advocate for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals. The *2017 Annual Report of the Financial Planning Association* will chronicle the work of the association over the past year and the many ways FPA is supporting our members and communities.

We have worked diligently to position FPA as a crucial voice in the quickly-evolving regulatory landscape, focused efforts on serving the needs of our younger professional members through close collaboration with the FPA NexGen community, better utilized core partners and thought leaders to help our members in their professional development, and much more. Externally, we continue to advance our fundamental purpose of transforming lives and elevating society through the *power of financial planning* while we focus internally on building the professional association of the future by supporting a key strategic priority – the OneFPA Initiative.

FPA is a community of communities. Our strength lies in our diversity of leaders and members who have chosen to come together around the noble cause of building the financial planning profession in the right way based on the right values. While great diversity is a powerful attribute, it also comes with its challenges. The OneFPA Initiative is the association’s major internal effort to deal with this challenge by better aligning and integrating FPA at all levels for the benefit of our members and all CFP® professionals, thereby ensuring we are leveraging our resources effectively. If we are going to realize our goal of being the “unquestioned resource and advocate” for our members, we need to better align our efforts with our many communities, including our network of 88 chapters and state councils that are instrumental in delivering value to our members.

Over the past year, we began working closely with many chapters and other communities to identify ways we can support their work while better integrating many of the resources, programs and content readily available through FPA nationally. While I hit the road with FPA Executive Director/CEO Lauren Schadle in 2017 to visit dozens of chapters, hundreds of volunteer leaders, and thousands of members to discuss this important initiative and share a vision for how we can better align our efforts, we have already started working with chapters in various capacities to help make them even more impactful forces in the advancement of members locally.

This important work will continue in 2018 and beyond, and I look forward to working with the 2018 FPA Board of Directors and our more than 2,000 FPA leaders across the country to continue our work and build on the momentum.

Thank you for your membership and for making FPA your professional home.

Sincerely,

A handwritten signature in black ink, appearing to read "Shannon J. Pike". The signature is fluid and cursive, written in a professional style.

SHANNON J. PIKE, CFP®
2017 FPA President



Letter From the Executive Director/CEO

“One way to keep momentum going is have constantly greater goals.” – Michael Korda

FPA has built terrific momentum over the past year as we continue to integrate and leverage our communities, values and strategies into a powerful OneFPA. We have a clear purpose and direction as we lean into further innovating our programs, services and benefits to ensure FPA is driving relevant value to our members through their affiliation with FPA and our 88 local chapters and state councils.

The FPA Member Advocacy Council (MAC) and the Legislative and Regulatory Issues Committee (LRIC) have been working diligently over the past year to ensure the collective voice of our members and all CFP® professionals are heard by those agencies that have influence over their businesses and the profession. As CFP Board continues to improve the *Code of Ethics and Standards of Conduct*, and federal and state regulatory agencies consider rules that govern all financial advisers, the work of the MAC and LRIC will be more important in 2018 than ever before.

Our Professional Development Team continues to improve upon the many educational programs offered by FPA nationally and is integrating these offerings at the local level through FPA chapters. The new FPA Speakers Bureau, for example, will open the doors in 2018 for chapters to offer the best-of-the-best speakers for chapter educational events. And under the leadership of our conference task forces, we are gearing up for [FPA Retreat 2018](#) at the Wigwam in Phoenix, the [2018 FPA Annual Conference](#) in Chicago and our spring and fall [Residency programs](#). They promise to be impactful, memorable events, so we hope to see you there!

We are re-engineering our Business Support programs and benefits to help our members make key business improvements that will drive productivity, profitability and success. One of the new programs that will be available shortly is the FPA Coaches Corner, which will provide FPA members with a vast library of business-building content from some of the most notable coaches in the profession. This will be an opportunity for our members to learn what they can do to take the next step in the evolution of their businesses and careers. We will also have new research coming in 2018 on business succession planning, trends in investing and much more.

And since community is at the heart of how FPA enables professionals of all backgrounds to connect, share and learn with each other, FPA will work in 2018 to expand the scope and breadth of our communities. Our vibrant FPA NexGen community will integrate into FPA at all levels to provide more meaningful support to new practitioners. We will capitalize on the momentum established by the [FPA Activate](#) community on Facebook, which is amplifying the connection between younger and more seasoned financial planners and leverage the “*You’re a Financial Planner, Now What?*” podcasts. We will also enhance our nine active Knowledge Circles, including introducing a new Knowledge Circle for planners serving the needs of the LGBTQ demographic and a new Knowledge Circle on behavioral finance with our partners at Capital Preferences.

These are just a few ways FPA is enhancing its relevance as THE association for CFP® professionals and the financial planning profession. Thank you for being part of the FPA community!

Sincerely,

LAUREN M. SCHADLE, CAE
Executive Director/CEO

About FPA



Financial Planning Association

The Financial Planning Association is the premier membership organization for CFP® professionals, the indispensable resource to help members supercharge the value of their CFP® certification, and become the best financial planners they can be. We believe true financial planners provide an invaluable, critical service to society, and that CFP® professionals lead the way in the commitment to raise the bar for the clients they serve – from transaction to transformation. In helping CFP® professionals of diverse backgrounds and business models amplify their knowledge, build new skills and construct the practices of the future, FPA aims to elevate and advance the financial planning profession.



“Being a member of FPA means belonging to the financial planning profession. Very few professional organizations have as many passionate members as FPA. Passionate not just about being successful planners, but passionate about truly making a difference in their clients’ lives and the future of the profession.”

Jorge Padilla, CFP® | FPA Member | FPA of Miami



Focus on the CFP® Professional



Focus on the CFP® Professional

The Financial Planning Association is the result of a merger in 2000 of the International Association for Financial Planning (IAFP) and the Institute of Certified Financial Planners (ICFP), when both organizations made a conscious decision to rally around the CFP® marks because they knew that the marks represented what financial planning was and could be moving forward – the gold standard in financial planning. This focus on the CFP® marks was originally forged in 1987 by industry pioneer, P. Kemp Fain, Jr., who in his seminal paper – **One Profession, One Designation** – said: “It is a worthwhile goal for all financial planning organizations to join in unifying the professional segments of the financial services industry into one profession, with one recognized designation or credential, promulgated in the public interest.”

While FPA welcomes anyone who supports the financial planning process, FPA believes in the long-term vision of building a profession around a set of requirements and standards that are in the profession’s and public’s interest. FPA recognizes the importance of rallying around a credential for the future of the profession and for the benefit of the public.



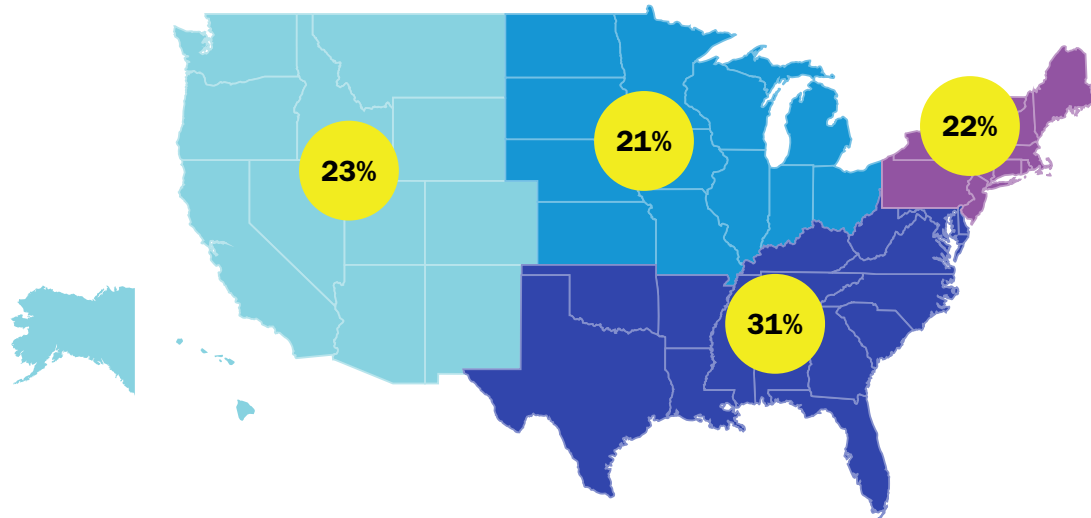
“As a second-generation CFP® professional, I’ve known the importance of the CFP® marks for most of my life. My father inspired me to become one of the youngest CFP® professionals in the country at the age of 25. The knowledge I obtained in earning my designation gave me the confidence I needed to grow personally and professionally in one of the most competitive environments in the country. Today, I serve as CFP Board Ambassador of New York and run a premier independent wealth management firm in Manhattan which specializes in Millennials, young professionals and entrepreneurs.”

Douglas A. Boneparth, CFP® | FPA Member | FPA of New York

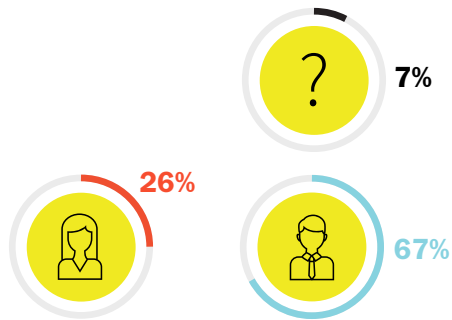


Member Demographics

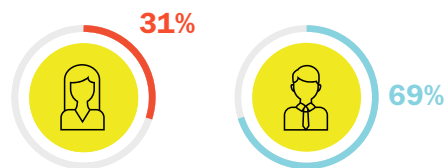
Geographic Region



Gender

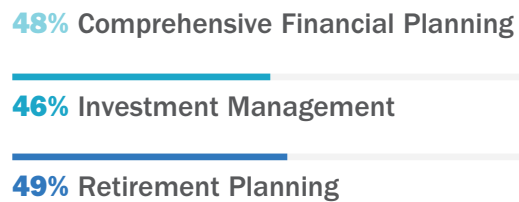


FPA Members

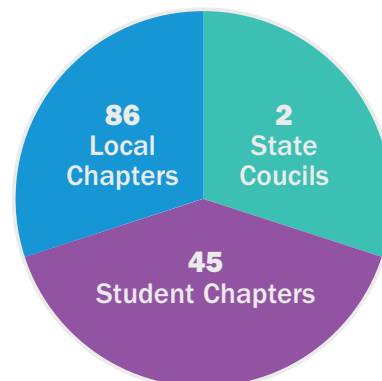


FPA NexGen (Age 36 and Under)

Area of Specialty



FPA Chapters

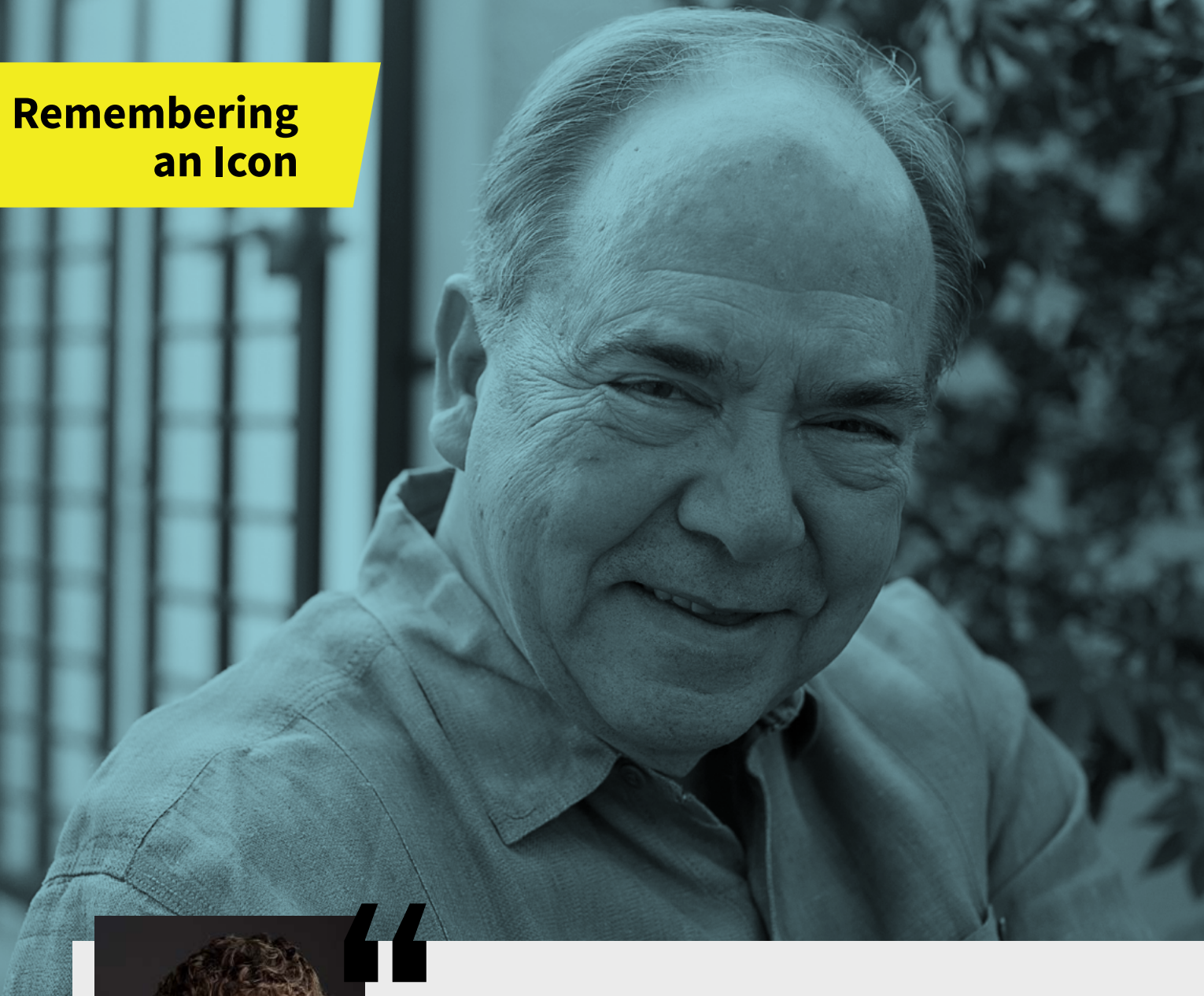


Average Years as an FPA Member

Average member has been affiliated for **8.93 years**

Average CFP® professional member has been affiliated for **10.25 years**

Remembering an Icon



“Dick Wagner had a special love for the Financial Planning Association. FPA was the family he would travel to visit around the country, having amazing conversations and participating in thought leadership. His work encourages us to take broader and more expansive views of money, value exchange and what money means. He encourages us to incorporate more disciplines, broaden our perspectives and to do something about the problems we see. To understand the layers of money and meaning we need to expand and shift our perspectives and assumptions about what might be and how value exchange can work.”

Jake Wagner, CDMP | FPA Member | FPA of Oregon & S.W. Washington

Remembering an Icon

In March 2017, FPA and the profession lost one of the great pioneers, thought leaders and icons financial planning has ever known – Dick Wagner, J.D., CFP®.

For 35 years, Dick was synonymous with financial planning. His tireless efforts as a thought leader, mentor, and advocate was instrumental in shaping the profession and setting it on a course to be recognized as a true “profession” in the most meaningful and upstanding sense of the word.

Dick’s passion for financial planning led him to serve in many leadership capacities including as president of one of FPA’s predecessor organizations, the Institute of Certified Financial Planners (ICFP), in 1993. Dick was always shaping the direction of the profession and was a prolific writer and speaker. From his seminal 1989 paper, “[To Think Like A CFP®](#),” to his recently published book [Financial Planning 3.0: Evolving Our Relationships with Money](#), it was Dick who helped lead the way in making the vision of a noble financial planning profession a reality. In recognition of his many outstanding contributions, he was awarded financial planning’s most prestigious honor, the P. Kemp Fain Jr. Award in 2003.

We are better for having known him and for his immense impact on setting the financial planning profession on the right and true path.



“Dick’s ideas, articles and conversations ignited me and helped me feel that I not only belonged in this profession, but that I had a role to play in its development. A lot of contributions have been made to financial planning and financial life planning, but Dick created the container and painted a grand sustainable vision that goes beyond a tool, a process or anything that can be monetized. He gave us the true beginnings of a profession with his demand for a greater purpose; for a theoretical framework and a language for describing the individual relationship with money that financial planners work with in their client engagements. Each one of us stands on his shoulders.”

Elizabeth Jetton, CFP® | Past FPA President | FPA of Georgia

2017 FPA Award Winners



The 2017 P. Kemp Fain, Jr. Award winner was Dr. Dave Yeske, CFP®.

2017 FPA Award Winners

2017 P. Kemp Fain, Jr. Award

Named for P. Kemp Fain, Jr., this award recognizes an individual who has made outstanding contributions to the financial planning profession in the areas of service to society, academia, government and professional activities. The 2017 P. Kemp Fain, Jr. Award winner was Dr. Dave Yeske, CFP®.

2017 Heart of Financial Planning Award

This award recognizes individual professionals, financial planning firms, FPA chapters, or organizations who engage in extraordinary work, contributing and giving back to the financial planning community and public through financial planning. Recipients of this prestigious award embody the heart of financial planning and represent FPA's Core Values of integrity, competence, dedication to relationship building and stewardship. The 2017 Heart of Financial Planning Award was presented to Marty Kurtz, CFP®, Michael Branham, CFP®, Scott Kahan, CFP® and Tanya Steinhofer, CFP®, CFA.

2017 Montgomery-Warschauer Award

This award honors the paper in the *Journal of Financial Planning* that provided the most outstanding contribution to the betterment of the profession in the preceding year. Professor of Accounting at University of Missouri-St. Louis, Greg Geisler, Ph.D., received the 2017 award for his peer-reviewed paper, "[Could a Health Savings Account Be Better than an Employer-Matched 401\(k\)?](#)," published in the January 2016 issue of the *Journal*.



Pamela Sandy, CFP® presented the 2017 Heart of Financial Planning Award to Marty Kurtz, CFP®, Tanya Steinhofer, CFP®, CFA, Scott Kahan, CFP® and Michael Branham, CFP®.



The 2017 Montgomery Warschauer Award winner was Greg Geisler, CFP®.

National FPA Leadership in 2017

The passion of FPA members who are committed to the association's vision and role in building the profession for the financial planning community is evident among our dedicated volunteer leaders. FPA volunteer leaders devote countless hours of their time and for that devotion and service we are incredibly thankful.



Front Row (left to right): Executive Director/CEO Lauren M. Schadle, CAE; 2017 FPA President Shannon J. Pike, CFP®; 2017 FPA Chair Pamela Sandy, CFP®; 2017 FPA President-Elect Frank Paré, CFP®

Middle Row (left to right): Todd Stanard, CFP®, ChFC, CRPC; Martin Seay, Ph.D., CFP®; Michael Shockley, J.D., CFP®; Skip Schweiss; Tony Mahabir, MBA, CFP®, CMC, CIM, RRC

Top Row (left to right): Molly Balunek, CFP®, AEP®; Carol S. Craigie, MA, CFP®, ChFC; John R. (Dick) Power, CFP®; Catherine M. Seeber, CFP®, CeFT™; Ann Reilly Dowd, CFP®

National FPA Leadership in 2017

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- Kasia A. Marczyk, CFP®, CRPC, CDFA
- Joshua T. Hatfield-Charles, ChFC, CLU, CEP
- Juan C. Ros, CFP®
- Lauryn Williams, CFP®
- Malik S. Lee, CFP®
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- Ann Dowd, CFP®

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- Shannon J. Pike, CFP®

Finance Committee

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- Pamela Sandy, CFP®
- Frank Paré, CFP®
- Catherine M. Seeber, CFP®
- Michael Shockley, J.D., CFP®
- Skip Schweiss

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P. Kemp Fain, Jr.

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- John A. Page, CFP®, RFP RFC
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- Bob Rall, CFP®
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- Hannah Moore, CFP®
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- Adam Cmejla, CFP®
- Bruce Steiner, Ph.D.
- Michelle G. Carney, CFP®
- Tony Mahabir, MBA, CFP®, CMC, CIM (Board Liaison)

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Business Success Knowledge Circle

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- Emily M. Chiang, MBA, CFP®
- Susan Rizzi, CFP®

Estate Planning Knowledge Circle

- Bob C. Phillips, CFP®, CFA, CPA
- Mark L. Prendergast, CFP®, CPA, CDFA

Investment Planning Knowledge Circle

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- Robert Van Beek, CFP®, EFA
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- Ashley S. Murphy, CFP®, AIF

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- David Mendels, MBA, CFP®
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- Mary Beth Franklin, CFP®
- Dan J. Galli, CFP®

Tax Planning Knowledge Circle

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- Rosemary Frank, MBA, CDFA, CFD, MAFF

Theory in Practice Knowledge Circle

- Christopher M. Browning, CFP®
- Margaret "Peggy" Doviak, Ph.D., CFP®
- Daniel Moisand, CFP®

Women in Finance Knowledge Circle

- Janice M. Cackowski, CFP®
- Laura H. Mattia, Ph.D., MBA, CFP®
- Jocelyn D. Wright, CFP®
- Tacy Roby, CFP®



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- Molly Balunek, CFP® (Board Liaison)

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- Duncan Williams
- Jerry B. Moore, CFP®, CIMA
- Rianka R. Dorsainvil, CFP®
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- Michael Bellopede
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- Edward W. Gjertsen II, CFP®

- Ana Gonzalez Ribeiro, MBA, PDMM
- David Haas, CFP®
- James Henderson
- Amy Irvine, CFP®
- Melissa Kemp, CFP®, AEP
- Bryan Lee, MBA, CFP®
- Gary LoDuca, CFP®, ChFC
- LaKhaun McKinley, CFP®
- Jessica O'Donnell, CFP®
- Alan Schoenberger, CFP®

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- Amanda Priebe, CFP®
- Christopher S. Draughon, CFP®
- Dennis J. Moore, MBA, CFP®
- Jeanna R. Fifer, CFP®
- Kristine Bean
- Krysta M. Patterson
- Mark L. Prendergast, CFP®, CPA, CDFA
- Marta Shen, Ph.D., J.D., CFP®, CPA, AIF
- Melisa Hall
- Russell G. Kroeger, CFP®, EA
- Suparna M. Tirukonda, CFP®
- Todd Stanard, CFP®, ChFC, CRPC (Board Liaison)

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- Catherine De Natale, CFP®, CIMA
- Edward W. Gjertsen II, CFP®

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- Jonathan T. Guyton, CFP®
- Kyra H. Morris, CFP®, EA
- Dr. Dave Yeske, CFP®

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- Lauren Grove, CFP®
- William M. Harris, CFP®
- Michael P. Haubrich, CFP®
- Kirsten Ismail, CFP®
- Hannah Moore, CFP® (NexGen Rep)

FPA NexGen®

- Rianka R. Dorsainvil, CFP® (Chair)
- Rachel F. Moran, CFP® (President)
- Ian Harvey, CFP® (President-Elect)
- Dana DeLance, CFP® (Secretary)
- Martin Seay, Ph.D., CFP® (Board Liaison)

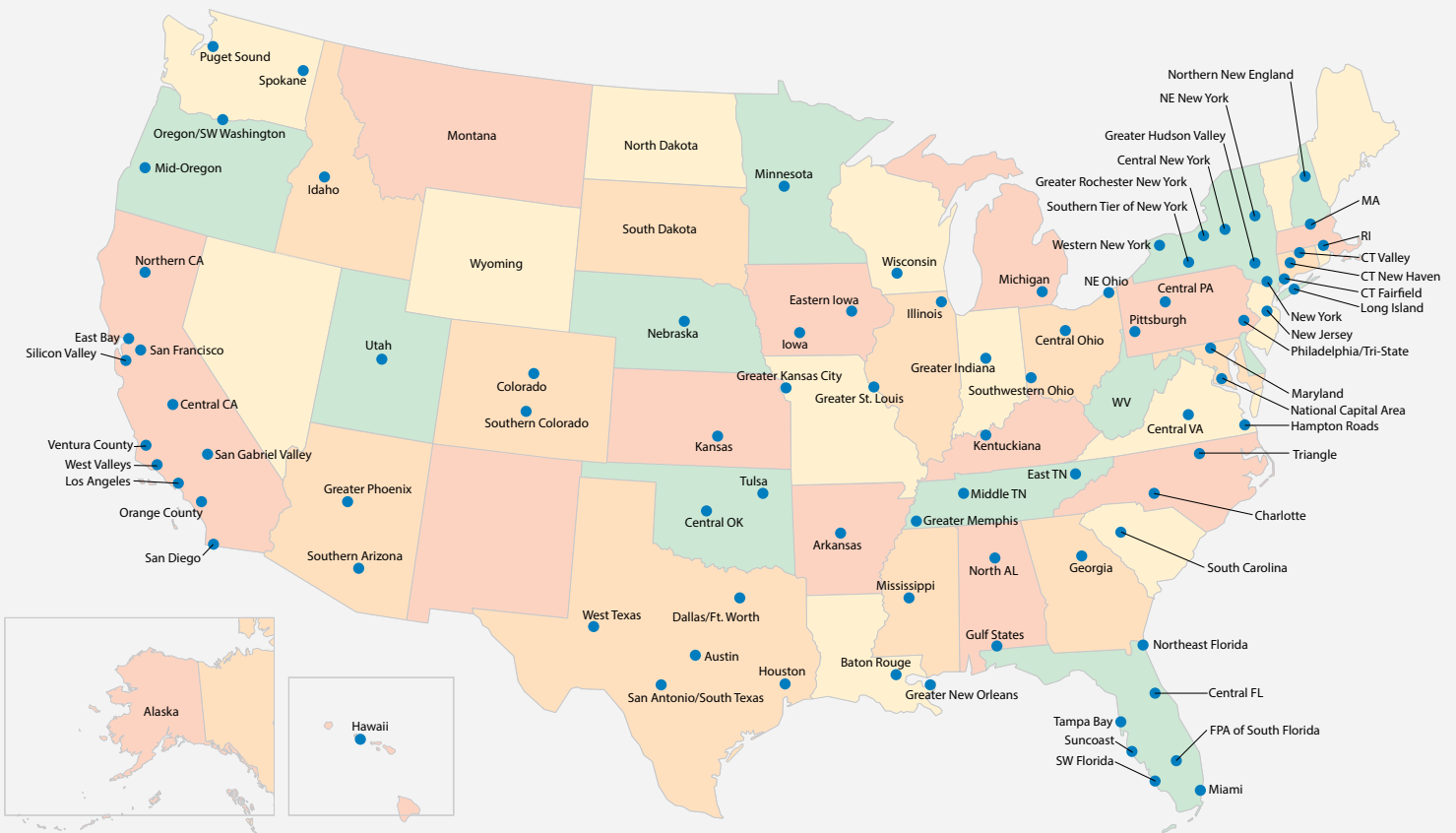
FPA Political Action Committee (FPA PAC)

- Edward W. Gjertsen II, CFP® (Chair)
- Janet A. Stanzak, CFP®
- Dr. Dave Yeske, CFP®
- Russell G. Kroeger, CFP®, EA
- Diane Evans



FPA Chapter Network

While FPA is a national association that brings the financial planning community together, it is through the network of 88 chapters and state councils coast-to-coast that makes it possible for members to learn, share and grow with their peers locally.



FPA would like to recognize the outstanding volunteer leaders who committed their time and talents to leading chapter boards in 2017. Their support of our association locally has made it possible for our members to fully tap into the power of our dynamic community.

FPA Chapter Network

FPA of Arkansas

- Thomas J. Knight, CFP® (2017 President)
- Tim Long, CFP®, CRPC
- Loren M. Ipsen, CFP®
- Josh Varvil (Chapter Executive)

FPA of Austin

- Darleen M. Gilmore, CFP® (2017 President)
- William R. Parrott, CFP®
- Jarrod Winkompleck, CFP®, ChFC, CRPC
- John E. Dougherty, III, MBA, CFP®, CRPC
- James G. Kaighin, Jr., CFP®
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- Chris Stolte, CFP®, AIF, ChFC, CLU
- Ann Connolly, CFP®
- Susan Palombo, CFP®
- Bill Simonet, CFP®, AIF
- Brooks Morgan, CFP®
- Lewis Weil
- Daphne Jordan, CFP®
- Luan Faglie
- Matt Bacon, CFP®
- Joseph Inskeep, Jr., CFP®
- Sarah Frankenfeld (Chapter Executive)

FPA of Baton Rouge

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- Corey P. Lockett, CFP®, AIF
- Paige Johannessen, CFP®
- Jeanne Takyi (Chapter Executive)

FPA of California

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- Alice King, J.D., CFP®
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- Janet Larsen, CFP®, CeFT, APMA
- Mark Prendergast, CFP®, CPA, CDFA
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- Michelle L. Carter, CFP®
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- Jeffrey S. Karst, CFP®
- Ashlee Veneman
- Tricia Kaye (Chapter Executive)

FPA of Central Florida

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- Sylvia Chris Presley, CFP®
- Gregory C. Collier, Sr., CFP® AIF, AEP
- Jonathan Colby Winslow, CFP®, EA
- James J. Flick, J.D.
- Matt Chancey, CFP®
- John M. West, III, MBA, CFP®
- Thomas Carney, CFP®
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FPA of Central New York

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- Uri (Chip) Doolittle, CFP®, AIF
- Thomas Mordaunt
- Thomas M. Griffith, ChFC
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- Daniel P. Jeffery, CFP®
- Leyla Z. Morgillo, CFP®
- Richard J. Naylor
- Mark Hills
- Carl Dattellas
- Anthony Hinds-Fritz, CFP®
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- Benjamin Murray, CFP®
- Paul J. Dolce, CFP®
- Michael H. Mulhern, CFP®, CPA
- Martina Peng, Ph.D., CFP®
- David C. Bowman, CFP®
- James D. Atkinson, CFP®, AIF, MPAS
- Gregory R. Johnson, CFP®, CAP
- Michael P. McMeans, CFP®
- Grant Mosher, CFP®
- DebbieLee Dougherty, CAE (Chapter Executive)

FPA of Central Oklahoma

- Christi S. Powell, CFP® (2017 President)
- Levi Wade, CFP®
- Jeffrey A. Ashford, CFP®
- Carol Ringrose Alexander, CFP®, AIF, CDFA
- Margaret "Peggy" Doviak, Ph.D., CFP®
- John T. Clement, CFP®
- Symphony Charles (Chapter Executive)

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- Larysa Prytula, CFP®, CDFIA
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- Dirk Olds
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- Nicholas Ziarek, CFA, AIF
- Andrea Bulen, CFP®
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- Clint R. Wondra, CFP®, CPA/PFS
- Julie Coombs, CFP®
- Anthony Perillo, CFP®
- Justin Moilanen, CFP®
- Brenda A. Matthias (Chapter Executive)



“As a chapter leader, I’ve really come to appreciate the great value that comes with having a voice. As a member of a group with thousands of unified voices, I’ve seen how FPA was able to change laws to protect our profession. I’ve watched FPA volunteers create financial plans and budgets for our neighbors in need. And each month, I get to visit with my top competitors where we share ideas to build better practices.”

Shane Sullivan, CFP® | FPA of Austin President | FPA of Austin

Supporting Our Members



Supporting Our Members

While there are many organizations providing financial planning professionals with resources and content, only FPA is in a position to be the unquestioned resource for CFP® professionals, with a robust slate of opportunities in the areas of Professional Education, Business Support, Advocacy, and Community.

Everything we do as an organization supports our role in providing members and the financial planning community with opportunities to become more knowledgeable professionals and more successful businesspeople, while also providing practitioners a voice on issues that impact their profession and a means to connect with their peers. We do this through thoughtful collaboration with industry thought leaders, partners and our network of chapters across the country.



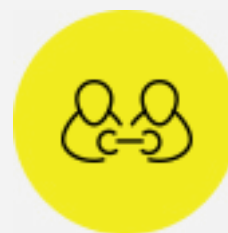
Professional Education



Business Support



Advocacy



Community





Professional Education

To increase proficiency, CFP® professionals must have access to the latest trends and information in financial planning, investments, risk management, estate planning, taxes, marketing, practice management and more. Access to these resources helps advance professional skill sets and knowledge while accruing valuable Continuing Education (CE) credits. FPA makes it easy for financial planners of all backgrounds and compensation models to learn and grow.

2017 Conferences & Events

2017 FPA Annual Conference

The **largest gathering** of CFP® professionals and thought leaders in financial planning in the U.S. took place early October in Nashville, Tenn. The event attracted more than 1,900 attendees from across the country and from around the world to experience two and a half days of highly rated speakers, continuing education sessions and roundtable discussions.

- Student Scholarship Program: FPA, in conjunction with its corporate partners, provided 50 conference registration scholarships to help FPA member students enrolled in CFP Board Registered Programs attend the FPA Annual Conference. As an attendee, students were able to network with peers and thought leaders and go to educational sessions that supported their professional development.
- Student Intern Program: This was an essential part of the staffing model for the FPA Annual Conference. Interns provided much of the onsite support in delivering an excellent experience for conference participants and received a complimentary conference registration scholarship, hotel accommodations provided and reserved by FPA, and up to \$500 of travel expenses. This program gave students opportunities to develop their professional network by gaining experience and exposure to thought leaders.

2017 FPA Retreat

With a long history of bringing the best minds in the financial planning profession together to learn and engage in deep conversations about the art and science of financial planning, **FPA Retreat** is often referred to as a multi-generational think tank dedicated to challenging attendees on how they “practice” financial planning. In April, over 300 financial planning professionals gathered at the Château Élan Resort outside of Atlanta to experience three days of advanced presentations, compelling peer-to-peer learning sessions and many hours of highly engaging conversations.

2017 FPA Residency

Due to the growing demand for this highly **acclaimed program**, FPA offered a June and October Residency to two cohorts of new or soon-to-be CFP® professionals. Under the outstanding leadership of Dr. Dave Yeske, CFP® and Jonathan Guyton, CFP®, more than 50 Residents gathered in Denver for six intensive days of study and role-playing, graduating with key communication skills and fully prepared for the challenging life situations they will experience with their clients.

2017 FPA NexGen® Gathering

This **meeting** of 130 of the best and brightest minds of the next generation of financial planners took place in June on the North Central College campus in Naperville, Ill. Attendees took advantage of this opportunity to discuss the hot topics and trends facing the future of the financial planning profession and to get to know their peers, colleagues and FPA leadership in an intimate and free-flowing setting.



Publications

Journal of Financial Planning

FPA's official publication, the ***Journal*** prides itself on a 38-year-old tradition to provide groundbreaking research for practitioner use in real-life planning with clients. The *Journal* champions the effort to align scholarly research with practitioner needs to foster the greatest collaboration of talents in the field. For more than a decade, the *Journal* has been a continuous winner of the APEX Award for Publication Excellence. Editorial highlights in 2017 include peer-reviewed research papers on the value of communication in client-planner relationships and predicting financial conflict in couples, and cover stories on serving millennial clients and the science of helping clients change. FPA members continue to rely on the *Journal* for advanced planning knowledge and CE credit.

Financial Services Review: This quarterly, peer-reviewed, academic publication encourages research that examines the impact of financial issues on individuals. Its primary purpose is the publication of traditional academic empirical research. Co-published by the Academy of Financial Services and FPA, members receive exclusive access to **digital editions**. Continuing education exams in each issue of *Financial Services Review* are provided to FPA members for four additional CFP® CE credits each year at no cost.

FPA Practice Management Blog: Powered by the *Journal of Financial Planning*, the **FPA Practice Management Blog** provides FPA members with relevant practice management tips on a weekly basis from other FPA members and partners. 2017 was another great year for the blog, remaining steady at approximately 32,000 unique visitors (same as 2016), which was a record-breaking year for the blog. Visitors to the blog this past year received advice on how to not commit the sins of website design and how to instantly connect with prospects.

FPA SmartBrief: Distributed to more than 16,000 professionals, **FPA SmartBrief**, a twice-weekly electronic newsletter provided the latest news and happenings from around the profession as reported by a variety of industry trade and consumer publications.



"In 2015, I was very lucky to be invited to co-host the FPA Business Success Knowledge Circle, which provided me with great opportunities to work with experts in the field of succession planning. In addition, I have participated as a panelist and a moderator for the Journal in the Round, which allowed me to network with other like-minded advisers and gain in-depth financial planning knowledge on practice management issues. I cannot ask for better opportunities to give back to our community and profession. Most importantly, FPA has helped me find my passion of helping other advisers regarding their succession planning process during the next chapter of my life."

Emily M. Chiang, MBA, CFP® | FPA Member | FPA of the National Capital Area

Education Programs

The goal of FPA education is to be the one authoritative source for members to find quality, relevant and impactful learning opportunities they need at every stage of their professional development. In addition to the live conference events and webinars, our self-study programs and on demand content (that is growing to include podcasts, whitepapers and video) and social platforms (FPA Connect, Knowledge Circles and FPA Activate) offers the continuous, blended and integrated experience required by the 21st century professional learner. Designed and delivered by top thought leaders, more than half provide CE credit that exceeds the CFP® professionals' yearly requirement, our programs build pathways leading to individual growth and improvement. Highlights from 2017 include:

Journal in the Round: Our monthly [online roundtable](#) where writers and other experts are invited to illuminate and debate the issues and ideas on and beyond the pages of the magazine. The series, which launched in late spring 2016 and is free to members, continues to grow in popularity and audience sizes that attract close to 400 attendees.

Professional Development Learning Center: FPA [learning programs](#) launched its new home on the Freestone/ Abila LMS platform. In early January, FPA members received communication and an invitation to explore the new website, discovering the improved look and functionality of a dynamic modern learning landscape necessary to meet their unique needs.

Collaborative Learning: These [programs](#) provide professionally designed and delivered content and materials, education solutions that are cost-effective, convenient and that provide great forums to network with colleagues. Groups and chapters can host CE eligible “In a Box” ethics or communications courses, or live stream any webinar from our online catalogue. The popularity of “Ethics in a Box” is growing as the program has been utilized by over 20 chapters and corporations since May 2016.

2017 Financial Planning Challenge: Hosted by FPA, CFP Board and Ameriprise Financial, this [three-phase competition](#) supports the next generation of financial planners and culminates in a final round held at the FPA Annual Conference. In 2017, eight universities competed for the top prize of \$10,000 in scholarship money for their school and a full scholarship for the winning team to attend the highly acclaimed FPA Residency program. The winners of the 2017 Financial Planning Challenge were Utah Valley University (first place), University of Illinois at Urbana-Champaign (second place), and Texas A&M University (third place).





Business Support

Just as financial planners need support to master the practice of financial planning, they require the knowledge and necessary skills needed to master the business of financial planning. FPA's Business Support tools and resources help financial planners be more productive, profitable and successful for the benefit of their businesses and their clients.

FPA Research and Practice Institute™

At the end of 2016, FPA introduced [Is Your Data Safe? The 2017 Financial Adviser Cybersecurity Assessment](#) that was completed in partnership with TD Ameritrade Institutional. As a result of that research, several action-oriented whitepapers were provided to FPA members in 2017 to help address core cybersecurity gaps in their businesses. Whitepapers included [Client Perception and Communication](#), [Is Your Team Prepared?](#), and [Current Threats and Risk Management](#).

FPA, the *Journal of Financial Planning*, and Longboard Asset Management partnered on the [2017 Trends in Investing](#) survey. This annual research provides financial planners with insight on how their peers are investing client assets and how those recommendations may change in the next 12 months. The 2017 survey showed continued preference of Exchange Traded Funds (ETFs) over all other investment vehicles and revealed that cash and equivalents have also now supplanted mutual funds in the hierarchy of preferred investment vehicles.

FPA Whitepaper Library

FPA is honored to have the support of many corporate partners that are developing content and resources to help the financial planning community be better planners and business owners. To better integrate these partners and their outstanding content into FPA for the benefit of our members, we launched the [FPA Whitepaper Library](#) in 2017 to make these resources more accessible. Content offered by these partners covers a wide range of topics, including investing and portfolio management, business growth strategies, business succession planning, and much more.

FPA Member Advantage Program (MAP)

In 2017, the [FPA Member Advantage Program \(MAP\)](#) was enhanced to improve efficacy for FPA members. The number of discount partners and offers were reduced to test a shift in program strategy, which provided valuable insight into the needs of FPA members and created a framework for the direction of the program in 2018. The program emphasized financial technology solutions for members and provided a hands-on approach to FinTech at the 2017 FPA Annual Conference. Through the creation of a partner and member "Tech Task Force," FPA was able to test and restructure the resources and benefits available to members.

FPA's focus has been on creating sustainable partnerships with firms that offer a unique and highly impactful benefit exclusive to FPA members of all business models, sizes and compensation structures. Currently, the most-used FPA member benefit remains the FPA Group Long Term Disability and Term Life Insurance programs with Ryan Insurance Strategy Consultants. We also added a Vision and Dental Insurance component for members and their families and secured a number of partners to create a series of compliance, errors & omissions, coaching and other exclusive programs to be rolled out over the next year.

FPA PlannerSearch®

With an eye on helping CFP® professional members of FPA increase their visibility online, FPA made improvements to the architecture of [FPA PlannerSearch®](#) in 2016. Those improvements were designed to make participating members more visible in Google searches, which would have an impact on the number of consumers coming to the platform and, potentially, engaging CFP® professionals in financial planning engagements. Over the course of 2017, those architectural improvements resulted in increased traffic to the website and in new leads generated for FPA members. If you're not taking part in FPA PlannerSearch® yet, learn more about the platform today!

FPA MediaSource

Gaining media attention is a critical element of enhancing financial planner visibility and marketing. To help, FPA MediaSource is connecting CFP® professional members of FPA with journalists from some of the most reputable media outlets in the world, including *MONEY*, *CNN*, *Wall Street Journal*, *MarketWatch*, *CNBC*, *Kiplinger's Personal Finance*, and many more. More than 900 CFP® professional members who have gone through FPA [media training](#) and are participating in FPA MediaSource have had a chance to respond to over 2,500 different media opportunities.



“I have been in the financial services profession now for over 14 years, and I can vividly remember three career changing events - passing my Series 7, conquering the CFP® Exam, and taking FPA’s media training class. Before FPA’s media training, I had no idea of where to begin and had absolutely zero success at being quoted prior. After, I felt confident that I was armed with all the knowledge and amazing resources through what was being provided by FPA MediaSource. In less than 30 days, I was quoted in two articles – one being MarketWatch! Since then I have been in Reuters, CNN Money, Yahoo Finance, CNBC, Nerd Wallet, and Investor’s Business Daily.”

Malik S. Lee, CFP® | FPA Member | FPA or Georgia



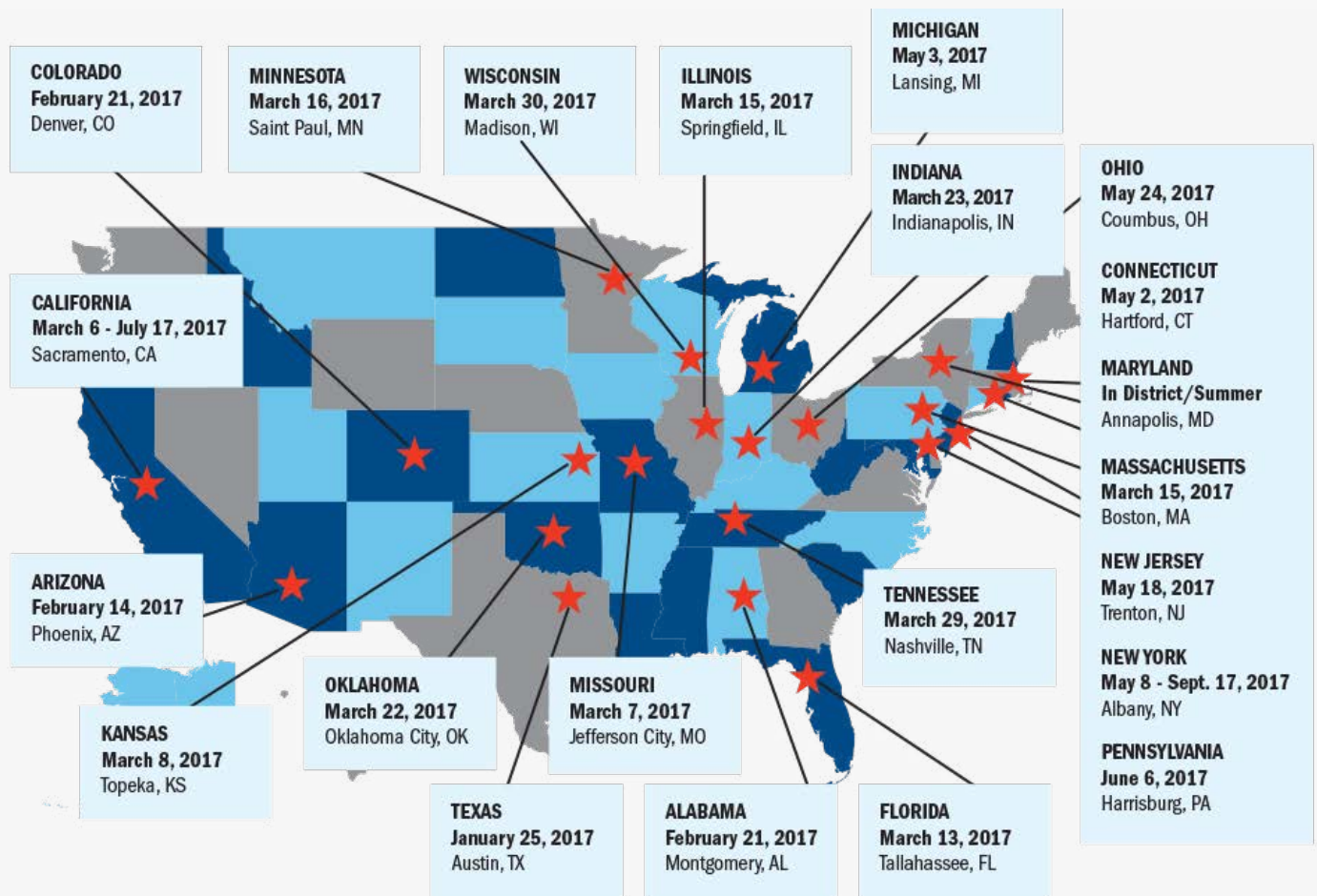
Advocacy

Advocacy's role in any professional association is designed to help ensure members are held in high regard at all levels. FPA gives CFP® professionals a powerful voice in ongoing deliberations about professional standards and potential regulations or laws that may impact those who provide financial planning services and investment advice.

2017 State Advocacy Days

In 2017, over 225 FPA members across the country participated in the [FPA State Advocacy Days](#) program. Members from 22 states represented FPA at their capitols to build relationships with their state elected officials and regulators. Provided with training and materials, our members advocated for the strengthening of financial protections for seniors, opposed the taxation of financial planning services in state budgets, and brought awareness to their state representatives and senators about the wide range of pro bono services that FPA members can provide through vetted programs. As a result, FPA members now serve on a variety of local financial committees and have partnered with elected officials on pro bono events in their districts.

In 2017, State Advocacy Days were held in the following states:



2017 National Advocacy Day

On June 21, 80 FPA members joined together in Washington D.C. for [FPA's 4th Annual Advocacy Day](#). Members from 22 states met with the offices of their representatives to discuss issues that are crucial to advancing our profession and to educate legislative leaders about our positions from a practitioner point of view on potentially harmful legislation. Our members conducted over 100 constituent-powered visits to represent FPA in the Halls of Congress and to grow awareness of our association on Capitol Hill.

- The FPA Executive Committee met with senior White House staff, the U.S. Department of Labor (DOL), and the Securities and Exchange Commission (SEC).
- FPA Leadership met with House Financial Services and Senate Banking Committee senior staff to discuss the DOL Conflict of Interest Final Rule and increasing investment adviser oversight.
- FPA members met with their Members of Congress and staff to educate them about the profession, underscore that FPA believes financial planning services should be delivered with fiduciary responsibility, and to emphasize FPA's commitment to pro bono volunteerism with seniors, veterans and struggling families. As a result, we have partnered with Members of Congress in their home districts to provide pro bono content in town halls, senior workshops, and veterans events.

This year, just prior to FPA's 4th Annual Advocacy Day, we held a half-day symposium, which qualified CFP® professionals for three hours of continuing education credits. The two panel sessions were *"Strategies for Making Your CFP® Valuable to Potential Clients,"* and *"What You Need to Know to Comply with the DOL Conflict of Interest Rule."* Sponsored by TD Ameritrade Institutional, these sessions provided attendees with an opportunity to share their own best practices as CFP® professionals and ask questions about complying with the DOL Conflict of Interest Rule.

Financial Planning Coalition

FPA partners with the Certified Financial Planner Board of Standards (CFP Board) and the National Association of Personal Financial Advisors (NAPFA) to form the Financial Planning Coalition. Together, we form policy positions on joint issues that support or pose a threat to our stakeholders. Our commitment to a fiduciary standard both at the DOL and the SEC supports our CFP® professional members and advocate federally for the increased examination of investment advisers. The recognition and regulation of financial planners is a long-term goal, so we seek to educate leaders about our profession, and to strengthen existing financial planner regulations and statutes through an enhanced enforcement strategy.



FPA Political Action Committee (FPA PAC)

The FPA Political Action Committee (FPA PAC) is the only PAC for financial planners and financial planning. As such, the FPA PAC has forged valuable relationships on Capitol Hill to educate members of Congress about the financial planning profession and supports candidates to help them understand FPA's policy objectives. The FPA PAC is a separate, legal entity governed by a separate board of directors with separate bylaws.

The FPA PAC disbursed over \$40,000 in 2017 to incumbent, federal candidates in a non-partisan manner. The FPA Board of Directors made its determination for disbursing funds by selecting leaders and representatives who serve on essential financial services committees and who vote on issues crucial to our policy positions. In 2017, the FPA PAC increased its access to key Members of Congress at events on Capitol Hill by having FPA Leaders visit with 11 elected officials.

Those in-person meetings included leadership and members from Senate Majority Whip, Senate Minority Whip, House Minority Whip, members of the Capital Markets Committee, members of the House Financial Services Committee, members of the Senate Banking Committee, and members of the House Ways & Means Committee.

FPA Advocacy Guidelines and Public Policy Issues

The Legislative and Regulatory Issues Committee (LRIC) recommended to the FPA Board of Directors they adopt the following:

- Changes to the FPA Advocacy Guidelines
- Support legislation that allows our members to exercise discretion with “may” reporting language to report financial exploitation of vulnerable adults to the State Securities Commissioner’s Office or adult protective services, which provides immunity from civil and administrative liability for reporting the alleged exploitation
- Support that financial planning fees be tax-deductible for clients on the state and federal levels



“I truly didn’t appreciate the importance and power of FPA’s advocacy efforts until I stepped up and became personally engaged in the process. I quickly realized FPA brings a ‘voice of reason’ to the many discussions occurring at the state and federal level due to the broad business diversity of our membership and our unwavering support of a fiduciary standard. Our advocacy efforts are keenly focused on developing authentic, trusted relationships which have resulted in FPA becoming a resource for state and federal legislators and regulators. A position that strengthens with personal involvement.”

Edward W. Gjertsen II, CFP® | Past FPA President | FPA of Illinois



Community

One of the most profound benefits of affiliation in professional associations is the opportunity to learn, share and grow with fellow members. FPA facilitates and encourages sharing and camaraderie between members — in person and online.

Community

FPA Connect is a secure engagement platform that provides the opportunity for FPA members to network, acquire knowledge, share expertise and grow with others at every stage in their financial planning career. On FPA Connect, members can learn, volunteer, participate, join FPA Knowledge Circles and reach out to other professionals for advice and support. The more involved our members become, the more they realize the value and full potential of their FPA membership.

FPA Activate is our new Facebook community cultivated by the next generation of financial planners to encourage, support and sustain a remarkable passion for the profession of financial planning. Launched at the 2017 FPA Annual Conference, this community continues to grow at a quick pace and currently has more than 500 members: students, career changers, CFP® professionals and new financial planners. Through this community, and with guidance from, Hannah Moore, CFP®, our next generation of financial planning professionals can taste the value of FPA's broader community and become entrenched in the daily discussions that shape the future of the profession.

Communities of Interest

- **FPA Knowledge Circles:** These content-specific communities bring members together to learn and share through hosted peer-to-peer conversation online and in-person. Directly aligned with the *Journal of Financial Planning* and working hand in hand with the *Journal in the Round* series, these specialty communities offer regular meetings, webinars, articles and conversations. FPA Knowledge Circles currently have more than 4,000 participating members and we have exciting new communities planned for 2018.
- **FPA NexGen®:** The FPA NexGen® community is comprised of over 2,500 members who are 36 or younger and active in the financial planning profession. The community, which now has a committed presence in roughly 50 percent of FPA chapters and has more than 36 local leaders across the country, is committed to ensuring the transference of wisdom, tradition and integrity, from the pioneers of financial planning to the next generation of our profession. **FPA NexGen Gathering 2017** sold out with a record number of 130 attendees in Naperville, Ill and the 2017 FPA Annual Conference featured three peer-to-peer presentations on reverse mentorship, fee structures, and a framework for serving millennial clients.



“FPA is all about Community, whether it’s my local chapter meeting, participating in FPA Connect or joining a Journal in the Round discussion, there are many ways for me to engage with thought leaders in the profession. The peer-to-peer sharing and learning in FPA communities is invaluable in keeping my professional skills sharp.”

Mark Prendergast, CFP® | FPA Member | FPA of Orange County

FPA Pro Bono

FPA, through the passion and dedication of our members and nationwide network of chapters, is committed to assisting individuals in underserved populations. FPA chapters are central to providing support and guidance to thousands of Americans struggling to financially achieve their goals through a variety of community outreach programs, including:

- **15th Annual Financial Planning Week:** This yearly program took place October 2-5, 2017, and brought financial planning educational activities, personal finance workshops, hotlines and more to consumers across the country.
- **Financial Planning Days:** Occurring throughout the year, the program harnesses the collective efforts of FPA chapters, members, and key strategic partners to create one-day opportunities for individuals to gain access to financial planning education, resources, and connect with financial planners. In 2017, 605 FPA members representing 17 chapters volunteered across the country to help more than 1,500 individuals address their financial concerns. The program is hosted by FPA, CFP Board, the Foundation for Financial Planning, and the U.S. Conference of Mayors.
- **Pro Bono Services:** In partnership with the Foundation for Financial Planning, FPA chapters help thousands of Americans each year by providing much needed one-on-one financial advice and counseling at no cost. The pro bono financial planning programs are held in recognition of the fact that not everyone can afford to work with a financial planner, but everyone can benefit from the advice financial planners provide. In 2017, more than 17,500 individuals benefited from pro bono financial advice or counseling by more than 1,500 FPA member volunteers.

FPA Focus on Diversity and Inclusion

FPA seeks to raise awareness and promote an environment that embraces diverse communities of consumers and professionals. In doing so, FPA strives to increase opportunities and access for the widest spectrum of people so all may join, collaborate and thrive within an inclusive financial planning community.

The FPA Diversity and Inclusion is a decade-long focus on raising awareness of the value of diversity within the profession to serve the diverse clientele that seek financial planning services. Three individuals won Diversity Scholarships to attend the 2017 FPA Annual Conference and to interact with the financial planning community. Kathleen Boyd, Divam Mehta, CFP®, ChFC, and Roger Ma, CFP®, all received a one-year FPA membership including chapter dues and one year's worth of chapter meetings in addition to attending the conference. The [Diversity and Inclusion Committee](#) is focused on creating turn-key resources for chapters to share with their members, in addition to working with experts within the diversity and inclusion field to bring FPA members relevant and timely content, tools and resources.



Corporate Partners



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Corporate Partners

FPA is a sought-after partner by companies and organizations that desire to support the work of the association, while directly benefitting the growth and success of our members. As major changes take place within financial services a significant transformation also needed to take place in how FPA works with corporate partners.

Over the years, the support of corporate partners has enabled FPA to enhance the body of knowledge that drives the financial planning profession, while directly impacting the bottom lines of its members. Given the critical changes taking place in the profession, and based on candid feedback from both partners and members, FPA has designed a more thoughtful, strategic approach to its alignment with corporate partners.

By taking this approach, FPA and its partners can bolster educational offerings, integrate content and provide a more impactful experience to members and all CFP® professionals.

Cornerstone Partner



Since 1975, Vanguard has been one of the marquee names in financial services. Not only do they serve investors with a proven, time-tested, client-focused methodology, but they are committed to helping those who serve investors be more knowledgeable and skilled in doing so. They also share in FPA's commitment to the financial planning community, the professional growth of CFP® professionals and belief that financial planning must be delivered in a competent, ethical and transparent manner.

Strategic Partners



In 2017, FPA continued Strategic Partnerships with Betterment for Advisors, Capital Preferences, Ryan Insurance Strategy Consultants, TD Ameritrade Institutional and T. Rowe Price. Additionally, we embarked on a new Strategic Partnership with Janus Henderson in the fourth quarter that extends through 2018. These partnerships tend to be one-year in length, are reserved for companies that desire an affiliation with FPA and are working with the association on a specific program or initiative that benefits FPA members and chapters.

2017 Partners and Sponsors

FPA would like to thank and recognize all companies that supported the association in 2017. Their contributions made much of FPA's programming and events possible.

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- Advantage Media Group / Forbes Books & Radio
 - Advent Solutions
 - Advisor Websites
 - Advizr
 - Advzyon
 - AI Insight
 - AIG Financial Distributors
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 - American Growth Fund Series II
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 - BillFin by Redi2 Technologies
 - Black Diamond by SS&C Advent
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 - ETF Global
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 - Fairway Independent Mortgage Corp.
 - fi360
 - Fidelity Investments
 - Financial Advisor IQ
 - Finworx
 - First Affirmative Financial Network
 - First Ascent Asset Management
 - First Command Financial Services
 - First Heartland Capital, Inc.
 - First Pacific Advisors (FPA Funds)
 - Flow Advisory
 - FOLIO Institutional
 - Fort Point Capital Partners
 - FP Transitions
 - Genivity
 - Green Alpha Advisors
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 - LPL Financial
 - Mairs & Power
 - Markel
 - Moneta Group LLC
 - Money Concepts
 - MoneyGuidePro
 - My Virtual COO
 - Myrepcchat by IonLake
 - NAPA Premier
 - National Endowment for Financial Education
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 - New Planner Recruiting, LLC
 - Northwestern Mutual Investment Services, LLC
 - Olive & Cocoa
 - Omaha Steaks
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 - Orion Advisor Services
 - Pacific Life Insurance Co.
 - Pathfinder Strategic Solutions
 - Permanent Portfolio
 - PIETech (MoneyGuidePro)
 - PIMCO (Pacific Investment Management Company)
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 - TriNet
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-



“Partnering with FPA has been one of the best decisions I have made for Yourefolio™. Working directly with FPA has allowed us to reach more members and expand our offering to a passionate base of CFP® professionals who provide superior services to their clients. FPA is a world class organization that supports our partnership in a variety of ways including helping us educate the members and providing technology solutions that impact their business. This is certainly a partnership we will continue to grow with as part of our ongoing operations.”

Scott Huff | Yourefolio | Cleveland, OH

2016/17 Financial Report

The Consolidated Statement of Financial Position and Statement of Activities presented below are for FPA's fiscal year beginning June 1, 2016, ending May 31, 2017.

Consolidated Statement of Financial Position

May 31, 2017

ASSETS:

Cash and cash equivalents	\$	3,882,494
Accounts receivable - net		243,572
Prepaid expenses and other assets		624,088
Property and equipment - net		540,439
Long term investments		2,489,001

Total Assets	\$	7,779,594
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LIABILITIES AND NET ASSETS:

Accounts payable and accrued expenses	\$	671,053
Deferred revenues, current		4,524,915
Deferred revenues, long term		44,658

Total Liabilities	\$	5,240,626
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Unrestricted Net Assets	\$	2,538,968
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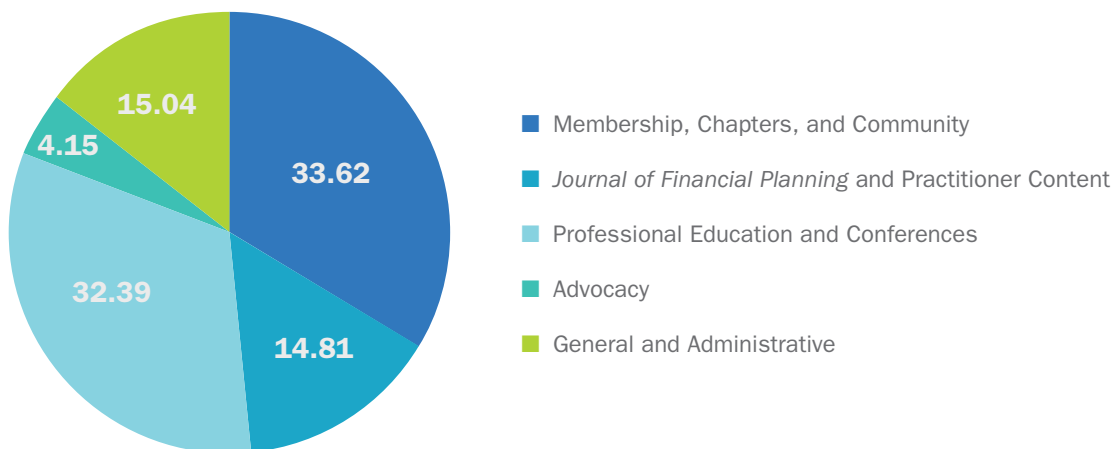
Total Liabilities and Net Assets	\$	7,779,594
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Consolidated Statement of Activities

May 31, 2017

REVENUES:	
Membership dues	\$ 6,953,484
Sponsorship	1,249,613
Event registration	1,163,620
Fees	649,712
Advertising	265,256
Rental income	46,286
Royalties and other income	350,990
Total Revenues	\$ 10,678,961
EXPENSES:	
Program Services	\$ 7,666,147
Supporting Activity	2,774,355
Total Expenses	\$ 10,440,502
Change in Net Assets	\$ 238,459
Net Assets, Beginning of Year	2,300,509
Net Assets, End of Year	\$ 2,538,968

Total Expenses Summarized by Program



2017 ANNUAL REPORT OF THE FINANCIAL PLANNING ASSOCIATION

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