

FSP Member Discount Program

As a Member of the Society of FSP you are entitled to discounted offers from the following companies.



FOR MORE INFORMATION on the **Member Discount Program participants**, please visit the FSP web site at www.societyoffsp.org/mdp.



A.D. Banker & Company is the nation's leading provider of Pre-Licensing exam preparation (for Insurance, Securities Industry Essentials, 6, 7, 63, 65 and 66) for new producers, advisors and staff. They also specialize in relevant and convenient insurance Continuing Education with both self-paced online and instructor-led webinars.



American Law Institute Continuing Legal Education (ALI CLE) is a non-profit organization and premier national provider of CLE since 1947. ALI CLE offers an array of legal seminars featuring the country's leading law practitioners, law professors, government regulators, and industry experts. Many of their programs qualify for CPE in addition to CLE. Programming is available in a variety of formats, including in-person conferences, live streaming webcasts, and convenient on-demand programs. FSP members receive a 30% discount on in-person conferences and a 40% discount on webcasts and on-demand programs.



Enjoy a full year of BARRON'S™ in both Print and Online FOR ONLY \$1 PER WEEK! Barron's delivers vital statistics, in-depth analysis, investigative reporting, company profiles and everything else you need to keep tabs on the investment world. You can receive 52 weeks of Barron's magazine plus one year of Barron's Online—all for only \$52. That's only \$1 per week and a savings of over 80 percent off the newsstand price and the standard 1-year rate for Barron's Online!



Bloomberg Businessweek offers surprising and timely perspectives on the most important issues of today and unique stories not found anywhere else. With Bloomberg Businessweek you'll have the insights you need to thrive in today's complex global economy. FSP members are entitled to receive 88% OFF what others pay on the newsstand - that's like getting 46 FREE issues! Plus, a Free iPad and iPhone digital subscription with each paid order. Only \$15 for 20 issues!



FSP is pleased to offer our members a discount with Brooks Brothers! As the country's oldest clothing retailer, Brooks Brothers is proud to uphold the same traditions and values for nearly two centuries. Enroll for your complimentary Brooks Brothers Corporate Membership Card and Save 15%* on full priced merchandise at all Brooks Brothers U.S. and Canadian stores, by phone, and online.

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The Business Source: FSP has teamed up with The Business Source to offer concise summaries of books you need to read. Each month learn best practices and gain powerful insights from leading-edge thinkers, industry experts and world renowned business gurus ... and the summaries take just 15 minutes to read or listen to! And best of all, we've arranged a special price especially for FSP members – 70% off the regular price (a savings of \$91)!



DocuSign is revolutionizing business, empowering more than 225,000 companies and more than 85 million users in 188 countries to use electronic signature. Use DocuSign to complete approvals and agreements in minutes or hours—not days—from almost anywhere in the world. Quickly and securely access and sign documents. Easily upload and send documents for others to sign. Send reminders and check signing status almost any time. **Try DocuSign eSignature FREE for 30 days.**



The FSP Discount Shipping Program, managed by PartnerShip LLC, can provide you with exceptional small package and express shipping discounts - all at no additional cost to you! Society of FSP members are now eligible for exclusive discounts that are typically reserved for high volume shippers.



FSP Group
**E&O
Insurance**

Enjoy lower premiums through the FSP group sponsored Errors & Omissions Program for FSP members and their agencies. Excellent coverage is provided by CNA Insurance Company and administered through CalSurance. This program features low annual premiums, multiple coverage limits, defense expenses outside the limits of liability, language to address current Department of Labor/Fiduciary coverage issues, network risk & privacy coverage, & coverage for premium financial risks. Also available to part-time agents as well as members transitioning from their career companies.



FSP Group
**Long-Term
DI Plan**

The FSP Voluntary Group Long-Term DI plan provides exceptional coverage from Standard Insurance Company and is offered through Ryan Insurance Strategy Consultants. Guaranteed issue basis (for all benefit amounts) is available to all eligible FSP members who apply during our Open Enrollment. This unique plan, features monthly benefits up to \$12,000, coverage to age 65+, a 90-day elimination period, inflation protection, as well as a retirement annuity contribution benefit, and assisted living benefits. For more details on this Group DI Plan.



FSP Group
**Rx Discount
Prescription
Card**

In an effort to make prescription drugs more affordable, FSP has partnered with Turning Point Wealth Strategies, LLC to introduce the Optum RX Discount Prescription Card. This card provides prescription discounts at over 68,000 pharmacies nationwide and offers an average of 18% savings on name brand drugs and 65% on generics, with savings potential as high as 95%! This FSP benefit is available at NO COST to you and can be shared with family, friends, business associates and clients!

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**FSP Group
Cybersecurity
Insurance Plan**

The FSP Cybersecurity Insurance Plan is an excellent opportunity to protect your business against the risk of cyberattacks and other types of data breaches, as financial services companies of all sizes are increasingly being targeted. This new plan allows you to choose the coverage that best meets the needs of your practice including Cyber Liability Insurance, Compliance & Certification, and Data Breach Risk & Compliance Assessment Report. It takes just minutes to obtain a quote and put this important coverage in place for your business. It's all online and is supported by licensed service agents.



HP offers you an incredible array of computer and digital equipment with special discounted association pricing including full size and mini-notebooks, tablet PCs, desktops, servers, scanners, printers, GPS, and other mobile devices. Discounted toner and ink with **FREE SHIPPING!**



JourneyGuide is the market innovator for retirement income planning that allows advisors to expand their advice from wealth management to retirement. Utilizing JourneyGuide software puts advisors in the forefront of the transition from holistic planning to holistic advice, creating comprehensive retirement plans in the best interest of their clients. FSP members receive one full year of access to the JourneyGuide innovative retirement planning software. Limited time offer for one free year and valid for new JourneyGuide subscribers only.



Justworks provides seamless payroll, HR tools, and compliance support through our all-in-one PEO platform. Plus, Justworks customers get access to rich, "big company" benefits, including medical, dental, vision, 401K, OneMedical and more. As a Justworks partner, the companies and firms of FSP members get their first month free! [a \$99-\$13,000 value].



Leimberg Information Services, Inc., is an E-mail subscription service that provides financial services professionals fast, frank, and incisive analysis and commentary on—as well as the actual text of—proposed and recent legislation regulation, cases, and rulings. This service will provide Estate Planning, Employee Benefits and Retirement Planning, Business Entities, Asset Protection Planning, Financial Planning and Charitable Planning Newsletters.



FSP members now have two credit card options when selecting the best card to fit your needs. The World Mastercard® Real Rewards Card allows you to earn point for every \$1 spent, then you can redeem the rewards to use the way you want. The Mastercard® Platinum Card allows you to save on interest and pay down your other credit card balances faster with the 0% interest on the introductory offer with this card. No matter which card you choose, you'll enjoy important features like EMV smart chip technology for added security, mobile purchasing capability for added convenience, plus much more!

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From simple goal-based planning to advanced cash flow analysis, NaviPlan® is the answer. Easily adapt to client needs through comprehensive, cash flow plans or quick goal-based assessments. Save valuable time with our integrations while putting your clients' minds at ease with ISO-certified data security and the most in-depth and precise plans in the industry. FSP members receive a 10-percent discount for those who sign a three-year agreement.



FSP Members can receive 15% discount off the list price on thousands of office supplies and print/copy items with Free/Discounted Shipping! FSP members can also receive 10% off your first order of \$100 for new Office Depot/Max signups plus enjoy monthly promos. Members can also receive discounts on over 300 items including select coffee products (i.e., K-Cup® packs) plus lowerweb/catalog prices.



PT Marketing specializes in appointment-setting services exclusively for the financial services and insurance industries and we have been doing so for 20 years. Make connections and grow your business with an effective, quality oriented appointment-setting service. PT Marketing will position you as the expert and help you secure meetings with the decision-makers in your niche. FSP Member receive a 10% discount!



The Master of Science in Financial Services at Saint Joseph's University's Haub School of Business is both AACSB accredited and CFP® Board Certified. This innovative graduate program provides professionals like you with the tools, theory and practical knowledge to engage in professional financial planning services and financial analysis. In addition, seven courses within the MSFS program satisfy the requirements of the CFP® certification examination.



Social Security Timing® is the patented software used by thousands of advisors to analyze their clients' Social Security benefits and find the strategy that is right for each client's individual circumstances. The software program quickly compares hundreds of possible Social Security timing and election strategy combinations and finds the option that offers the highest lifetime benefit. Advisors who use the software help their clients with one of the biggest decisions about retirement – when to claim their Social Security benefits. As a member of Society of FSP, save 20% with coupon code SFSP15.



Quickly and easily illustrate what taxpayers think about how they're taxed is quite different from reality. Our tool will help you turn prospects to clients with a customized "tax map" report that, in less than five minutes, illustrates how non-taxable income may become taxable. You'll be able to show how tax credits or deductions may be phased out at higher incomes and illustrate various income and tax scenarios. Try Tax Clarity™ software for free for 10 days and with no obligation. (No credit card required.)