FPA
FINANCIAL PLANNING ASSOCIATION

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TAKE 5

JUNE 2018

Share your thoughts on the SEC's proposed rules and interpretations

The SEC is proposing three new rules and interpretations that will impact the work of financial planners and the clients they serve. To collect member sentiment on the SEC's proposals, the FPA Member Advocacy Council (MAC) and Legislative and Regulatory Issues Committee (LRIC) will hold a member conference call on June 21 at 4 p.m. ET. The feedback you provide will be shared with the Financial Planning Coalition, of which FPA is part, to help guide the Coalition's official comment letter that will be filed with the SEC.

Learn how FPA has the backs of CFP® professionals

A cornerstone of any profession is the willingness of those in the profession to have their voices heard on those policies that impact them. Check out the following links to learn about FPA's current advocacy priorities, explore FPA's advocacy day events, learn about the FPA PAC, the FPA Legislative and Regulatory Issues Committee, and the FPA Member Advocacy Council. FPA needs passionate members like you to get involved in advocating for the profession!

Financial planning scholarships from Golden Gate University

Golden Gate University is offering 30 scholarships exclusively to FPA members aspiring to earn a CFP Board-registered Graduate Certificate in Financial Planning. The scholarships, worth $11,500 each, will be provided to FPA members who are new applicants to GGU's financial planning programs on a first-come, first-served basis. Applicants must meet the admissions criteria for the MS in Financial Planning and apply for and enroll in the Fall 2018 term. Learn more about how you can get your graduate certificate in financial planning. Contact Dr. Dave Yeske, CFP® today.

What's trending now in investments for financial advisers?

For the fourth consecutive year, Exchange-traded funds (ETFs) are proving to be the most used/recommended investment options by financial advisers. While ETF use continues to soar, cryptocurrencies are among the least used or recommended investment options. These and other trends are uncovered in the 2018 Trends in Investing Survey report by FPA and the *Journal of Financial Planning*. View the report and see where your peers are investing now and where they will be investing in the coming year.

FPA Coaches Corner Spotlight: "How PR Can Win Financial Planners Business"

Join Mike Byrnes of Byrnes Consulting and FPA Director of Public Relations Ben Lewis for an interactive discussion on building a public relations strategy to increase your personal and business brand awareness. Learn how you can harness the power of public relations in your practice in core areas, including media engagement and social media. You will also be able to get answers to questions about your public relations strategy. This live event will take place on July 12 at 4 p.m. ET. Register now.

Attention FPA Chapter Leaders:

Each month, FPA will provide you with a quick rundown of five news items worth sharing with chapter members at meetings, events and in newsletters. If you have any questions, please email Ben Lewis at BLewis@OneFPA.org or Ryanne Harrah at RHarrah@OneFPA.org.