



**Partners in an Emerging Profession:
Academic Opportunities with the FPA**

2009 Program Directors' Conference
Certified Financial Planner Board of
Standards, Inc.






Agenda

- Shared Purpose
- Snapshot of FPA
- Priorities
- Opportunities & Collaborations
- Action Steps



Who We Are



- FPA is the **“Heart of Financial Planning”** serving those who need, support and deliver financial planning
- We are deeply passionate and best in the world at being **community**

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FINANCIAL PLANNING ASSOCIATION
The Heart of Financial Planning

Our Shared Purpose

Guardians of the growth of the profession ... support and affect the success of the next generation of financial planning professionals

Planner Perspective
 "FPA is the means by which you grow up. It's how you get the knowledge and experience to be the planner you want to be."
 Aaron Coates CFP® and co-founder NexGen Community

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FPA Profile

- More than 25,000 members
- Median Age: 54
- Largest Member Types:
 - 21% Independent RIAs
 - 18% Independent BDs
 - 11% RIAs affiliated with IBD
- Average Years in Practice: 15 (27% 0-4 Years)
- Firm Size:
 - 1: 13%
 - 2-5: 38%
 - 6-10: 13%
 - 11-50: 18%
 - 51-100: 3%
 - More than 100: 15%
- Compensation Model
 - Mostly Transactional: 18%
 - 1/2 Transactional and 1/2 Fee: 14%
 - Mostly Fee: 32%
 - Fee Only: 32%
- 96 Chapters

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Priorities

- Member Knowledge Development, Business Development and Practice Management
- Academic Relationship Management

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A Closer Look

Career & Professional Development

- Career Center
- Leadership
- Annual Conference
- Volunteer & Student Program
- Professional Development Advisory Group
- Career Development Task Force
- HR Professional Development Forum
- Networking & Mentoring
- NextGen Community & Conference

Chapter Opportunities

- Student Chapters
- Career Day
- Networking & Mentoring
- Networking
- Source for Faculty & Speakers
- Learn Study Groups
- Meetings & Symposiums

Education & Learning


- Virtual Learning Center
- Programs in A Time
- Journal of Financial Planning - Peer Review
- Academy of Financial Services
- FPA Research Center
- Economic Recovery Resource Center
- Contributions
- American Society of Pension Professionals & Advisors
- Financial Planning Librarians
- Academic Advisory Group
- Conferences
- Webinar Education
- Financial Planning Assist

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Membership Opportunities

- Educator: \$145 (plus CE package \$225)
- Student (degree program): \$35
- Student (certificate program): \$145
- Candidate CFP® Certification: \$175
- 1st Year CFP® Certification: \$195
- 2nd Year CFP® Certification: \$295

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Open Dialogue:

- What's missing?
- How do we reach students?
- How can we create a stronger partnership?
- Q&A

Opportunities & Collaborations



Wanted:



You and Your Students!

Planner Perspective
"In FPA, I'm never alone. There is never a time when I get frustrated and don't have someone to turn to. I've never had that kind of community before."
Clare Stenstrom, CFP®, Active FPA Member
