



Partners in an Emerging Profession: Academic Opportunities with the FPA

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

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**

**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

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



Priorities

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

A Closer Look



Career & Professional Development

- Career Center
- Residency
- Annual Conference Volunteers & Student Program
- Professional Development Advisory Group
- Career Development Task Force
- Professional Development Pavilion
- Networking & Mentoring
- NexGen Community & Conference



Chapter Opportunities

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



Education & Learning

- Virtual Learning Center
- Programs In A Box
- Journal of Financial Planning – Peer Review
- Academy of Financial Services
- FPA Research Center
- Economic Recovery Resource Center – Contributions
- American Society of Pension Professionals & Actuaries
- Financial Planning Essentials
- Academic Advisory Group
- Conferences
- Consumer Education
- Financial Frontiers Award

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

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