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FEBRUARY 2017 FPA Member Advantage



Visit www.OneFPA.org/MyDiscounts

FPA members have access to insurance benefits and practice management resources that can save financial advisers thousands each year.

Our FPA Member Favorites are:

- Markel, FPA Errors & Omissions Insurance – **page 3**
- MoneyGuidePro, Financial Planning Software – **page 3**
- Ryan Insurance, FPA Group Long Term Disability – **page 4**
- SBA Loan Group, Small Business Loans – **page 4**



An example of a three-year membership cost-savings:

MEMBER ADVANTAGE PROGRAM	MEMBER DEAL	PUBLIC RATE ¹	FPA RATE ²	THREE-YEAR MEMBER SAVINGS ³
Financial Planning Software (MoneyGuidePro)	\$300 off/year	\$1,295	\$995	\$900
Errors & Omissions Insurance (Markel)	At least 5% off	\$4,500	\$4,275	\$675
Voluntary Group Long Term Disability	Up to \$15,000 in monthly coverage, guaranteed issue, FPA group rates	\$600/month ³	\$225/month	\$13,500
Client Marketing Content	Unique FPA content program at one flat rate	\$14,800/year	\$200/year	\$43,800
CFP Education, Exam and Ethics course	15% off required CFP education, special rate on CFP exam, special rate on required Ethics CE course	\$5,645/one time plus \$199 Ethics course/every two years	\$4,703/one time plus \$119 Ethics course/every two years	\$1,022
<i>Journal of Financial Planning</i>	Free member benefit	\$139/year	Free	\$417
Total Potential Savings for FPA Members:				\$60,314

Partners referenced are: MoneyGuidePro, Markel, Ryan Insurance, Kiplinger, College for Financial Planning, and the CFP Board.

¹ Rates are based upon average FPA member and licensing data for one adviser with <10 employees.

² Annualized over a three-year period, does not take into account membership type or dues, as that will vary.

³ Monthly premium for guaranteed renewable individual policy issued by Standard Insurance Co. with comparable benefits to the FPA group LTD policy.

Visit www.OneFPA.org/MyDiscounts

8x8, Inc.

Discounted VoIP pricing for qualified accounts

Advantage Media Group

Boutique, vanity publishing and free consultations

Advicent Solutions

20% off financial planning and portfolio management software

AdvisorBid

Free membership to adviser networking platform

AdvisorStream

20-30% off automated marketing platform

Advisor Websites

FPA pricing on website design and service packages

Advyzon

One month free CRM, portfolio management and performance reporting

AI Insight

10% off alternative investment training

The American College

RICP® tuition waiver

ARAG

Personal legal insurance exclusively for FPA

Avis

Save 25% on car rentals nationwide

Bloomberg BNA

20% off professional tax planning software

Bucket Bliss

Reduced \$49/mo. planning software subscription

Budget

25% off car rentals in US and CA

CalSurance Associates

RIA and Life Agent E&O plans

The Client Driven Practice

25% off three-month coaching program

College for Financial Planning

15% off education, prep and FPA scholarships

Compliancedashboard

Up to 25% off compliance subscription

Expedia

Guaranteed additional savings, 10% off hotels

fi360

10% off AIF® certification and toolkit

FP Transitions

Special rate on valuations and more

Golden Gate University

10% tuition reduction

Kaplan

20% off CFP® education, prep and scholarships

Keir Educational Resources

20% off CFP® prep and scholarships

Kiplinger

\$200 client articles subscription

Legal Zoom

15% off personalized online legal solutions

LifeLock

30 day free trial and 10% off

MONEY College Planner

20% off college planning tool

My Virtual COO

\$500 off a customized improvement plan

NAPA Premier

E&O starting at \$777 for members

Nest Egg Guru

\$100 off planning software subscription

NRS

15% off ComplianceGuardian

Office Depot/OfficeMax

Up to 80% off and free shipping

Olive & Cocoa

10% off corporate gifts

Oranj

10% off annual subscription

Orion Advisor Services

15% off data aggregation, portfolio management

Pathfinder Strategic Solutions

Save hundreds on content marketing resources

Performance Insights

Up to \$200 off teambuilding and HR consulting

PlanPlus

20% off planning software

Plum Benefits

Up to 60% off events and attractions

Protected Tomorrows

15% off special needs education

Redtail Technology

Save \$9/mo. on CRM

RetireUp

10% off retirement income modeling software

RIA In A Box

One month free compliance support

Markel

MEMBER FAVORITE!

FPA's top partner offering members comprehensive Errors & Omissions insurance (and cybersecurity solutions) at a minimum guaranteed 5% discount since 1989. Markel Cambridge works with leading providers in the E&O space to offer FPA members – especially CFP®s – reduced rates on excellent coverage options. Thousands of FPA members take advantage of this program each year.

- Stable premiums, flexible limits and deductibles, and almost 30 years of experience in providing customized coverage
- Superior claims management, duty to defend, and included pre-claim investigative services
- Optional coverages include cyber, commission sales, tax preparation, management liability and wire fraud.

Phone: 800.691.1515

Email: gseveringhaus@markelcorp.com

MoneyGuidePro®

MEMBER FAVORITE!

FPA's top partner offering members an exclusive \$300/year discount on the leading financial planning software on the market today. With the release of MoneyGuidePro® G4 in 2016, FPA advisers will enjoy increased efficiency and the ability to add value to the planning process based on your experience, knowledge and relationship. Thousands of FPA members take advantage of this program each year.

- Highly scalable to reach more clients.
- Designed to position you as the expert.
- Helps you efficiently meet DOL best interest standards.

Phone: 800.841.5312

Email: enterprise@moneyguidepro.com

RightCapital

10% off interactive planning software

RightSignature

30% off electronic signature packages

Ruby Receptionists

\$100 off first month service and free activation

Seasons of Advice®, Client Servicing Model

20% off consulting program

SKY Marketing Consultants

50% off marketing services

SS&C Advent

Save 15% on Black Diamond Wealth Platform

Staples

Discount pricing and free next-day shipping

Succession Link

\$150 off annual subscription

TriNet

25% off setup fee and ongoing discounts

TWAMS Financial Planning

Outsourced financial planning services for advisers

SBA Loan Group

MEMBER FAVORITE!

FPA's SBA Loan Group program assists members in qualifying and obtaining small business loans. Hundreds of members turned to SBA just this year for buying or growing their financial planning businesses. As one of the leading small business loan packagers in the country, SBA Loan Group offers FPA members financial opportunities that may not be available otherwise.

- Long term (10-25 year) loans
- Loan amounts up to \$15,000,000
- Low interest rates (5-6.25% APY)

Phone: 646.699.1344

Email: jarret@SBAloangroup.com

Ryan Insurance Strategy Consultants

MEMBER FAVORITE!

FPA Long Term Disability and FPA Term Life Insurance programs are available exclusively for FPA members. Over 12% of members take advantage of one or both plans each year, making our LTD program our most-utilized member benefit aside from the Journal of Financial Planning. Members may join at any time, however Guaranteed Issue is only available during the first 60 days of membership for LTD, or within the first 60 days after your initial one year anniversary for Term Life. Annual Open Enrollment periods, while never guaranteed, typically happen in the spring and offer Guaranteed Issue as well. The LTD program's top benefits include:

- Guaranteed Issue available
- Up to \$15,000 maximum monthly benefit
- Premiums 30-60% lower than individual policies with similar features

Phone: 816.439.5204

Email: Clay@RISC.biz

Twenty Over Ten

\$100 off compliant website design services

Verizon

Up to 18% off eligible plans

Veterinary Pet Insurance

5% off Nationwide-affiliate pet insurance

Wine Country Gift Baskets

10% off gift baskets

Yourefolio

\$600 off legacy planning software annually